



The Ultimate Guide to Text Message Automation

How Automated Text Messaging Can Boost
Your Sales Performance

Why Listen to Us?

Calldrip is a global leader in Conversational Sales software, with an emphasis on lead response and process improvement. More importantly, we're deeply committed to helping our customers grow.

10K+

users around the world.

1M+

leads distributed annually.

<1 min.

average lead response time.

6M+

Connected calls per year.

25M+

conversations.

Intro

In today's era, your prospects and customers expect excellent service delivered via channels that are convenient to them. Research shows that more than a third of customers would stop doing business with a brand they loved after one bad experience.

So what makes a great experience? For about 80% of Americans, the most important factors of a positive experience are speed, convenience, knowledgeable help, and friendly service.

That means you simply can't ignore one of the most - if not the most - convenient, quick, and accessible channels: SMS text messaging.

One way to make text messaging easier to implement is with text message automation.

In this guide, you'll learn:

- What text message automation is all about
- Why it matters
- How text messaging fits into your automated lead follow-up system
- 5 best practices for texting leads
- Whether to call or text
- Software to implement text message automation

THIS ALL-IN-ONE GUIDE WILL WALK THROUGH EVERYTHING YOU NEED TO KNOW ABOUT TEXT MESSAGE AUTOMATION FOR YOUR MARKETING AND SALES.



What is Text Message Automation?

You know what texting is, but what about text message automation?

Text message automation is the process of automatically sending text messages to the right audience, at the right time, to streamline your sales process.

Text message automation is all about striking up a meaningful conversation at the right moment, on a convenient channel.

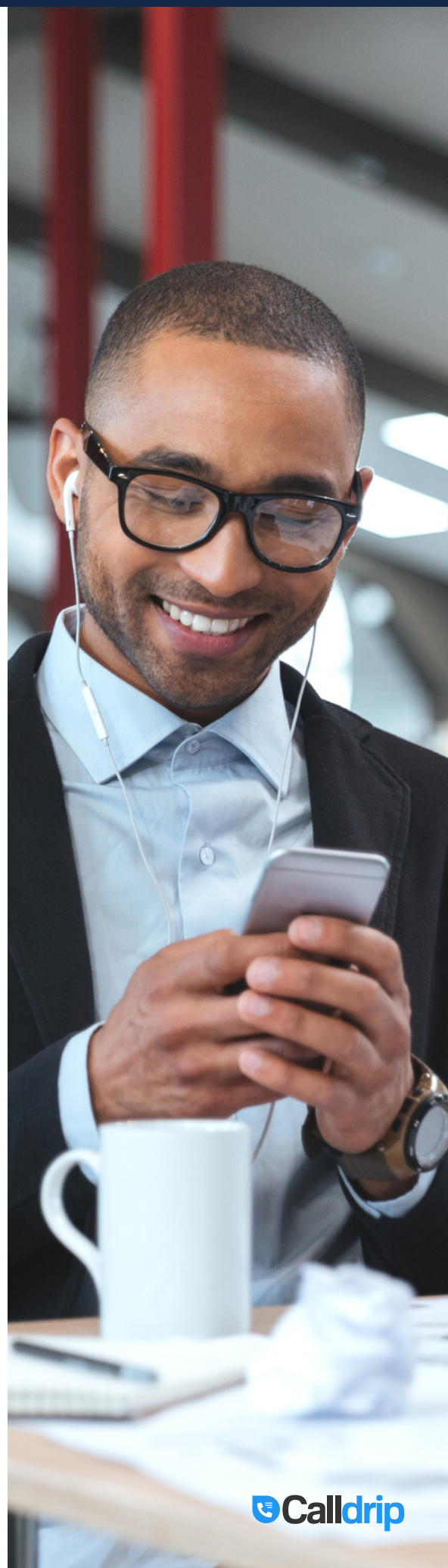
There are lots of ways text message automation can be used: as appointment confirmations, lead follow-up messages, or even scheduling or payment prompts.

Why is Text Message Automation Important?

In marketing and sales, it's essential to be present where your prospects are, online and in the real world. And in this day and age, everyone is on their phones.

Communicating via text is valuable because that's where your leads, prospects, and customers are.

Plus, customers want this kind of communication. Over 90% of consumers said they would opt-in to text messages from a brand.





5 Benefits of Text Message Automation

Here are a few more benefits to text message automation:

1. Connect with your leads and prospects before competitors.

After all, 78% of sales go to the first company who responds. Text message automation can help ensure that you're the first to answer.

2. Respond to inbound leads quickly.

Companies that respond to leads within 5 minutes are 100x more likely to win the sale than those that respond within 30 minutes. Text message automation supports rapid lead response by helping you respond to leads instantly.

91%

of consumers would be happy to receive to text messages from a brand.

3. Build a great customer experience.

After all, prospects and customers want to be able to efficiently get their questions answered. Automatic text messages provide opportunities for self-service opportunities like booking appointments, as well as support conversations.

4. Make sure no leads slip through the cracks.

An automated text message system eliminates much of the risk of human error. Rest easy knowing that your leads, prospects and customers are taken care of, no matter when they get in touch.

90%

of text messages are opened within 3 minutes.

5. Spark a positive human connection.

Studies show that 82% of US consumers want more human interaction in the future. Even though they're automated, your text message strategy can come from a real person and initiate a real, human conversation.



Text Messaging as Part of Your Automated Lead Follow Up System

An “automated lead follow-up system” is the systems, processes, and technology you use to automatically follow up with leads and prospects. An automated lead follow-up system can include emails, phone calls, and yes, even text messages!

An automated lead follow-up system allows your team to be responsive to leads, prospects and customers, even when they’re not actually available. Plus, it frees them up from spending time manually sending a bunch of emails or texts.

For example, your automated lead response system could be set up so that, when a prospect fills out a form, a quick automated thank you email is sent, and an automated text is sent telling them to expect a call from a member of your team. Even that call can be automated!

A good automated lead follow-up system will allow you to be on all the important channels - when it contributes to a more positive customer experience, of course. The best automated lead response systems also include analytics and reporting so that you can proactively evaluate and improve your sales team performance.

Your automated lead follow-up system should support sales excellence. And with a strong automated text message system, you’ll be able to connect with your leads when and where they are.





How Does Live Text Messaging Fit Into the Picture?

Both automated and live text messages are important for your sales and marketing, but they have different applications.

Automated texts are great for quick follow-ups, like responding to an inquiry, confirming an appointment, asking for a review, or sending a thank you note. Personalized, manual texts are great for live sales and service conversations.

When you explore text messaging software for your business, you might look for one that offers both automated and manual texting functionality.

5 Best Practices for Texting Your Leads

So you're ready to start implementing your automated text message system? Here are five tips for texting with leads, prospects, and customers.

1. Focus on speed.

Rapid response matters. When you implement automated text messaging, make sure that you're focusing on providing an instant response that's both on-brand and helpful.

For example, if someone fills out a demo form, you could send an automated text message with a calendar link to book a time.

2. Be friendly yet professional.

Even though texting is a much less formal channel, you should still make sure you're being professional. After all, you're still creating a brand experience!

In most cases, it's not appropriate to be extremely casual via text. Make sure that you're using grammatically correct language and choosing easy-to-understand words. Of course, this depends on what you sell and how your leads, prospects, and customers like to be communicated with. Depending on your audience, slang words or saucy language might be appropriate.



3. Make it easy to convert from an automated conversation to a live sales call or text communication.

Sometimes, an automated conversation needs to be able to convert to a live phone call or text message conversation. When texting leads, you need a way to do this seamlessly.

5 seconds.

That's how quickly it takes for most texts to be delivered. Plus, most text messages are open within 90 seconds.

4. Use consistent phone numbers.

Many lead texting technologies will allow you to use a custom number with your area code. This can help signal to the lead that you are who you say you are, and build trust. (It also helps avoid spam filters!)

This phone number should be a company phone number, owned by the business and not the employee. This ensures you always maintain the data and have a record of all conversations.

You may even want to take it a step further by leveraging your current landline number! CallDrip has a unique tool that allows you to accept messages to your current landline, as well as send text message from your landline number.



5. Leverage a shared inbox.

Make sure you're using a shared inbox. There are a lot of benefits to this. For one, it helps make sure no conversations slip through the cracks, because everyone has visibility.

It also allows your entire team to pitch in if one of your team members is unavailable.

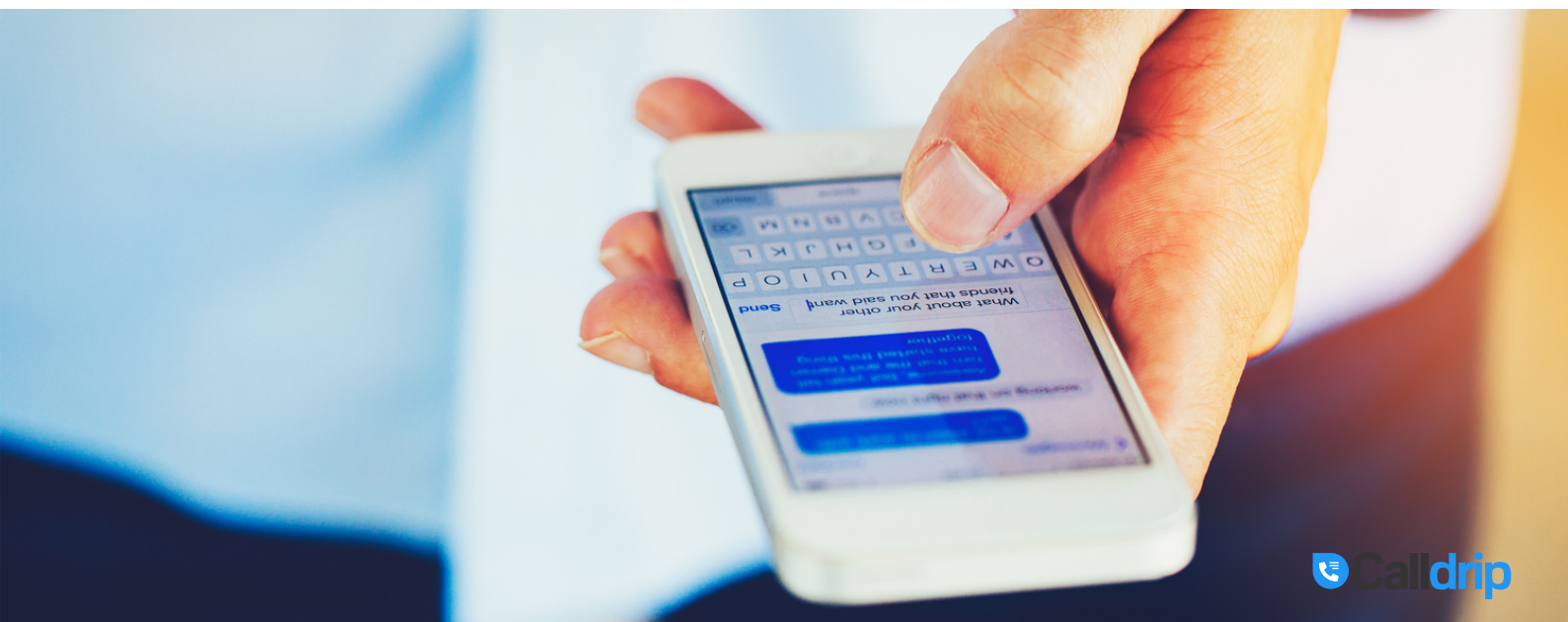
Finally, it provides transparency to your management team, who can then review the messages to identify sales coaching opportunities. This shared inbox is also helpful for the compliance, HR, and operations teams.

To Call or To Text?

So, should you call, or should you text? Today, the answer is most likely both! It all depends on your customers and the situation.

Remember, people don't buy from companies, they buy from people. Make an effort to build that connection in the way that serves your leads, prospects, and customers. Sometimes, a call might be easier, while in other instances, a text might be just as good. It's all about listening to your leads and customers, and respecting their wishes.

Again, you don't have to choose. Particularly when you're responding to a new lead, there are benefits to trying both call and text! By attempting both, you let them know their business is important to you.





How to Choose the Right Text Message Automation Software

There are lots of text message automation tools out there. Of course, we'd love for you to pick CallDrip, but we also know we may not be the right tool for everyone.

With that in mind, here are a few features to look for when choosing a text message automation software for your business.

Integrated Phone and Text Conversation History

Look for a system that allows you to view phone and text message conversation history in the same inbox, so you can see the entire conversation thread. Ideally, this would not only show the text messages, but also inbound and outbound call history.

Customizable Text Message Templates

Using templates is a great way to personalize yet streamline your response process. Look for a tool that allows you to customize these templates with contact information and even deal details.

Customer Review Requests

Make it easy to request customer feedback. Some text message automation tools have the ability to send out customer review requests after a conversation or appointment.

Text Conversation Workflow Automation

The best text message automation tools allow you to build workflows based on triggers, like call completion date and time, call disposition, and more. For example, maybe you want to automatically send out a customer review after a service appointment. The right tool can let you build that as a workflow, so that your busy service rep doesn't have to remember to do it.



Easy Implementation

Select a system that's easy to implement and actually use. Your team is busy, and it can be hard to get them to learn or adopt new software. Choosing an easy-to-use tool, and ideally one that supported by strong customer service in case you need a helping hand, makes it more likely that you'll be successful.

Shared Inbox

Make sure your texting software offers a shared inbox so that you have visibility into every contact and conversation. This is helpful for your management team to ensure that no leads fall through the cracks, as well as to provide sales coaching. It's also useful for HR and Compliance purposes.

Available On-the-Go

Your team won't always be at their desk, particularly in this new hybrid work world. Look for a tool that offers a way to review and engage in text message conversations on your mobile phone, ideally via an app. CallDrip recently released a mobile app that allows your sales team to see new leads, assign text conversations, and communicate.

45%

of text messages get a response, versus just 6% of emails.





How Text Message Automation Helps Improve Your Sales Speed & Win Rate



Online Shopper Submits an Inquiry

When a visitor is shopping or researching on your site, you have a golden window of opportunity. This is their peak moment of interest. When they submit that inquiry or info request, Calldrip helps you spring into action.



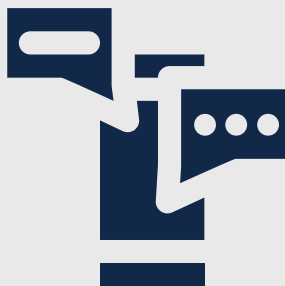
Automatic Text Response

Instantly send a personalized text message thanking them for the inquiry, and letting them know to expect a phone call shortly. Calldrip offers a shared inbox so you see every note.



Automated Phone Call Response

Calldrip automatically starts a call from your sales team to the shopper. Don't worry, we provide your sales team with key information before the dial. All they need is a mobile phone!



Connect with the Shopper in Seconds

Companies that respond within 5 minutes are 100x more likely to win the sale than those that respond within 30 minutes. Calldrip helps you be first. Plus, responding via call and text lets your leads communicate using the method that's most comfortable for them. Using custom lead assignments, the right person will be empowered to strike up the right conversation at exactly the right moment. That's the power of rapid lead response.



Respond: A Rapid Lead Response Tool for Call and Text Message Automation

CallDrip's flagship product, Respond, is a rapid lead response tool empowers you to strike up conversations via phone and text using lead-to-call and lead-to-text automation.

What does that mean? Simply put, that we instantly convert form inquiries into phone and text conversations.

This lead-to-call and lead-to-text automation dramatically improves conversation rates. It lets you connect within seconds, before your competitors, with an authentic and human touch.

It also enables you to automatically connect the customer with the right person, at the right time on their preferred channel

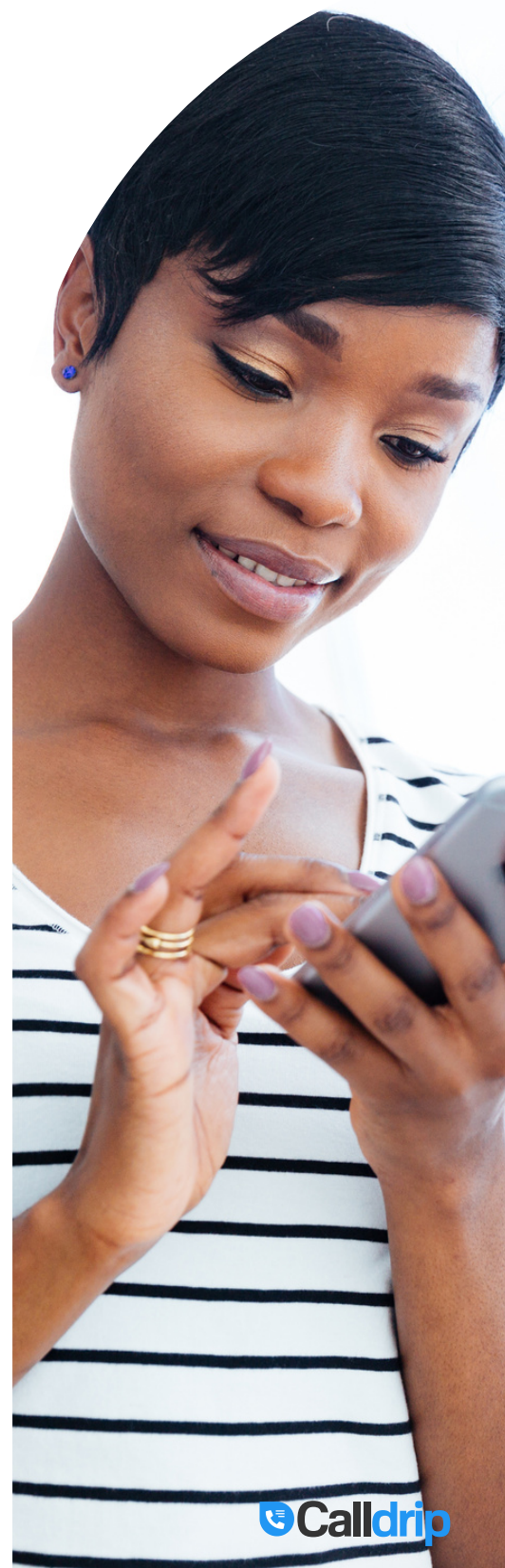
Respond even has a feature where you can automatically leave a perfect, pre-recorded voicemail and/or follow-up text message if the person doesn't pick up.

[Book your quick, risk-free demo today.](#)

Conclusion

In today's connected and convenience-focused world, it doesn't get much better than communicating via text.

If you're not sure where to start, CallDrip is here to help. Our all-in-one conversational sales solution offers not only lead-to-call and lead-to-text automation to support your rapid lead response efforts, but also business text messaging, sales coaching, performance analytics, and so much more.



How Calldrip *Respond* Works

See how Calldrip's flagship product, Respond, helps you connect with your prospects in seconds!

1. A LEAD SUBMITS AN INQUIRY

When a prospect fills out a form on your site, clicks on an ad, or calls into your business, Calldrip instantly records the inquiry.

2. CALLDRIP CONNECTS YOUR SALES REP TO THE LEAD

Calldrip automatically kicks off a call to the right sales rep, as well as an instant text to your new lead that someone will be in touch. Before the call connects, your sales rep will hear a whispered message with the lead's contact and inquiry details so they're ready.

3. TALK TO THE PROSPECT WITHIN 30 SECONDS

Right after the whisper, Calldrip dials the lead. Within just a few seconds, your sales team will be having a personal conversation with the lead at the peak moment of interest. You'll probably start hearing "Wow, that was fast!"

4. FOLLOW UP WITH A TEXT BASED ON THE CALL

Immediately after the call ends, you can send a quick, thoughtful follow-up note. This text can be customized to be different based on whether your sales rep left a voicemail or the call connected live.

[BOOK A FREE 30-MINUTE DEMO TODAY!](#)

