

SMS Marketing — Workbook

This workbook turns the course into a launch-ready operating kit for a compliant, profitable SMS channel. Work through each section as you stand up a real program, filling the worksheets with your own numbers and using the checklists to verify nothing breaks before you send. The templates are editable planners for your compliance and consent record, a messaging calendar with cadence and quiet-hours guardrails, and a campaign ROI tracker.

Foundations: Why SMS Wins and How to Stay Legal

Choose your number type, register it, and lock down the consent and compliance basics before you send anything.

Checklist: Legal and Carrier Compliance Checklist

- Marketing texts collect prior express written consent (affirmative, recorded, not pre-checked)
- Sign-up discloses program name, recurring messages, consent-not-a-condition, and message-and-data-rates
- STOP, UNSUBSCRIBE, CANCEL, QUIT, and END all opt the user out and are honored immediately
- HELP returns program info and a contact; a single STOP confirmation is sent
- Promotional sends are restricted to roughly 8 a.m. to 9 p.m. recipient local time
- No SHAFT (Sex, Hate, Alcohol, Firearms, Tobacco) content without strict age-gating
- A timestamped consent record is captured and stored for every subscriber

Worksheet: Number Type and Registration Worksheet

Decide which sending number fits your volume and capture the registration details your platform will need. Expected subscriber count in 12 months

Expected peak messages per second needed

Chosen number type (10DLC / toll-free / shortcode) and why

Legal business name and EIN for brand registration

Business address and primary contact for The Campaign Registry

Campaign use-case (marketing) and 2-3 sample messages

How consent is collected (described for the campaign registration)

Monthly budget for number and platform fees

Exercise: TCPA Exposure Self-Audit

Pressure-test your current or planned program against the consent rules before a single non-compliant text creates per-message liability.

- For any text you plan to send, is it marketing or transactional, and which consent bar applies?

- Could you produce a timestamped record of exactly how and when each subscriber consented?

- Where does the required disclosure appear at the point of opt-in, word for word?

- If a regulator asked you to prove consent for 100 random subscribers tomorrow, could you?

List Growth and Segmentation: Building an Asset You Own

Stand up compliant opt-in flows, deliver a welcome series, and define the segments every campaign will target.

Worksheet: Opt-In Flow Planner

Plan each place you will collect numbers so every entry point is high-converting and compliant. Opt-in method (single / double / keyword / checkout)

Capture tool or placement (pop-up, tap-to-text, checkout box, in-store sign)

Incentive offered (e.g., 15 percent off, free shipping)

Exact disclosure text shown at consent

Keyword and number for offline and cross-channel sign-up

Target opt-in conversion rate (percent of visitors)

Exercise: Welcome Series Copy Drill

Write the welcome flow that converts your warmest traffic, leading with value and carrying the required compliance language.

- Write message 1: brand name, the incentive code, one shoppable link, and HELP/STOP language, under 160 characters.

- Write the 24-hour reminder for subscribers who did not use the code, including the expiry.

- What single call to action appears in each message, and is it only one?

- How will you measure success: revenue per recipient and code-redemption rate, not just clicks?

Worksheet: Segment Definition Worksheet

Define the dynamic segments you will send to, using behavior, lifecycle, and RFM rather than blasting everyone.

Segment name

Definition (engagement, purchase behavior, lifecycle, or product affinity)

RFM read (recency / frequency / monetary signal)

Default cadence for this segment (per week or per month)

Standard exclusions (e.g., recent purchasers, opted-out)

Primary message strategy for this segment

Checklist: List-Building Hygiene Checklist

- Consent disclosure is identical across pop-up, checkout, and offline keywords
- No bundled or pre-checked consent for phone and email together
- Welcome automation fires immediately on opt-in with the promised incentive
- Incentive size is matched to the customers you actually want to retain
- Segments are built as saved dynamic segments, not manual lists
- Back-in-stock and product alerts target only the people who requested them

Campaigns and Automations: The Messages That Make Money

Build the promotional sends and triggered flows that drive the bulk of SMS revenue, with discipline on discounts and length.

Worksheet: Promotional Campaign Brief

Plan a single promotional send so the copy is tight, the audience is right, and the message stays one segment.

Campaign goal and offer (e.g., 25 percent off for 48 hours)

Target segment and exclusions

Message copy (identify, offer, urgency, one link, STOP) under 160 characters

SMS or MMS, and why

Character count and segment count check (watch emoji / UCS-2)

Send date, time, and time-zone setting

Trackable short link used

Exercise: Abandonment Flow Design

Design a cart-abandonment sequence that recovers revenue without training subscribers to abandon for a coupon.

- What is the delay and copy for text 1 (name the item, link to cart), and does it carry no discount?
- At which message, if any, do you introduce an incentive, and why not earlier?

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- What exit condition stops the flow the instant the subscriber purchases?
 - How will you verify add-to-cart and checkout events are firing from your store before going live?
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Checklist: Campaign and Automation Launch Checklist

- Message identifies the brand and includes required opt-out language
- Copy fits one SMS segment (160 GSM-7) or MMS is a deliberate choice
- No emoji or special character silently splitting the message into extra segments
- Cart and browse abandonment delay any discount to a later message
- Triggered flows have a purchase exit condition so buyers are never re-texted
- Back-in-stock alerts go only to that product's waitlist
- Transactional and marketing consent audiences are kept separate

Cadence, Deliverability, and Measuring ROI

Set a sustainable rhythm, protect your number's health, and prove the channel is profitable.

Worksheet: Cadence and Send-Time Worksheet

Set a starting cadence and timing plan you can adjust on data, with quiet hours as a hard constraint. Planned campaigns per month (start band 4 to 8)

Cadence for engaged vs dormant segments

Quiet-hours window enforced (recipient local time)

Time-zone-aware sending enabled (yes/no)

Send-time windows being tested

Opt-out-rate threshold that triggers a cadence pullback (e.g., above 2 to 3 percent)

Checklist: Deliverability Health Checklist

- 10DLC brand and campaign are fully registered and the trust score is acceptable
- Branded, trackable short links are used instead of public URL shorteners
- Copy avoids ALL CAPS, excessive punctuation, and restricted content
- STOP requests are honored immediately and complaint rate is low
- A sunset policy removes chronically unengaged subscribers after a win-back attempt
- Invalid, landline, and undeliverable numbers are scrubbed
- Delivered rate and opt-out rate are reviewed after every major campaign

Exercise: ROI and Profit Calculation Drill

Work the real economics of one campaign so you judge it on net profit, not vanity clicks.

- What is the revenue per recipient (attributed revenue divided by recipients) for the campaign?
 - What did the channel cost: per-message fees, platform share, and any discount margin given away?
 - Which attribution window did you use, and is it applied consistently across campaigns?
 - Did the campaign clear net profit after costs, and how does its revenue per recipient compare to your flows?
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Your Action Plan

1. Choose your number type and submit 10DLC brand and campaign registration through The Campaign Registry
2. Write and store your compliant opt-in disclosure and start capturing timestamped consent
3. Launch a high-converting opt-in pop-up plus tap-to-text and add offline and email-footer keywords
4. Build the welcome automation that delivers the incentive immediately and identifies your brand
5. Define your core dynamic segments by engagement, lifecycle, and RFM, with standard exclusions
6. Stand up the cart-abandonment and browse-abandonment flows with discounts delayed and a purchase exit
7. Add back-in-stock capture on sold-out products and route transactional and two-way messages
8. Set a starting cadence of four to eight campaigns a month with time-zone-aware quiet-hours sending
9. Monitor delivered and opt-out rates after each send and sunset unengaged subscribers on a schedule
10. Run a monthly ROI review of revenue per recipient by campaign and flow, net of all costs

