STRETCHLEARN · WORKBOOK

SMS & Push Notification Marketing — Workbook

This workbook accompanies the SMS & Push Notification Marketing course and gives you the exercises, worksheets, and templates needed to build a real, compliant, revenue-generating mobile channel for your business. Work through each section alongside the corresponding module and complete every item before moving to the next — the exercises build on each other. All templates are designed to be customized with your brand's data and reused for every campaign cycle.

Compliance, Platforms, and Subscriber Acquisition

Audit your current opt-in flows for legal compliance, select your platform stack, and plan your first subscriber acquisition campaign.

Exercise: Compliance Audit: Rate Your Current Opt-In Flow

Review every place on your website, checkout, and post-purchase sequence where you currently collect or plan to collect SMS or push subscribers. For each collection point, answer the prompts below to identify compliance gaps before you launch.

• Does each opt-in location include your brand name, message type description, estimated frequency, and carrier disclaimer? List which elements are missing at each touchpoint.

• How are you storing consent records (timestamp, IP address, opt-in source)? If you are not storing all three, describe how you will fix this before your first send.

• Are any opt-in checkboxes pre-checked? If yes, which pages, and what is your plan to replace pre-checked boxes with unchecked opt-ins?

• For push notifications: does your site show a soft-ask modal before the browser system prompt? If not, draft the headline and body text for a soft-ask modal tailored to your brand.

Worksheet: Platform Evaluation Scorecard

For each platform you are considering (score at least two SMS platforms and one push platform), rate the platform on the dimensions below from 1–5. Use your completed scores to make a final platform selection and document the rationale.

Platform name

Monthly cost at your current or projected subscriber volume

Native integration with your e-commerce platform (1=none, 5=native plugin)

Compliance features: consent recording, STOP/HELP handling (1=manual, 5=automated)

Segmentation depth: RFM, behavioral, lifecycle filters (1=basic, 5=advanced)

Flow builder quality: branching logic, conditional splits (1=limited, 5=full)

Attribution and reporting quality (1=basic, 5=detailed RPM + flow reporting)

Total score (sum of rows 3–7)

Final selection: YES or NO

Rationale for selection

Checklist: Subscriber Acquisition Launch Checklist

[ ] Exit-intent popup is live and tested on mobile and desktop with compliant opt-in language
[ ] Checkout opt-in field is present with separate marketing consent checkbox (not pre-checked)
[ ] Welcome message fires within 2 minutes of SMS opt-in and delivers the promised incentive
[ ] STOP, HELP, and CANCEL keywords are handled automatically by your platform
[ ] Consent records (timestamp, IP, source) are being logged for every new subscriber
[ ] Soft-ask modal is live for push notifications and tested across Chrome, Firefox, and Safari
[ ] Push opt-in is triggered after second product view or cart add — not on first page load
[ ] A/B test is running on at least one opt-in unit (e.g., discount-led vs. scarcity-led headline)

Copywriting and Message Design

Write and test your first SMS and push messages using the frameworks from this module, then build a structured testing log.

Exercise: Rewrite Three of Your Existing Messages Using the Four-Part SMS Formula

Find three SMS or push messages you have sent previously (or, if new, three messages from competitors or brands you admire). Rewrite each one using the four-part SMS formula: (1) brand identifier, (2) specific offer or news hook, (3) scarcity or urgency signal, (4) link and opt-out. Then count the character length and annotate which part does which job.

• Paste the original message and count its character length. What is missing or vague about the offer or urgency?

• Write your rewritten version using the four-part formula. Label each part. Is it under 160 characters in ASCII?

• For each rewritten message, write an alternative version using a different urgency mechanism (if the first used a deadline, try scarcity, and vice versa). Which feels more authentic to your brand?

Worksheet: A/B Test Planning Sheet

Plan your next SMS or push A/B test using this worksheet. Complete one row per planned test. Use a sample size calculator to fill in the required audience size before launching.

Test ID (e.g., SMS-001)

Channel (SMS or Push)

Variable being tested (one only: offer framing / urgency type / send time / message length / personalization)

Variant A: full message text

Variant B: full message text

Baseline click rate (from recent sends or industry benchmark)

Minimum detectable effect (percentage point lift you want to detect)

Required sample size per variant (from sample size calculator)

Planned send date and time for each variant

Primary success metric (click rate / RPM / opt-out rate)

Planned winner declaration date

Result: winning variant and observed click rates

Checklist: Message Quality Review Checklist (Run Before Every Send)

[ ] Message leads with a specific number or named offer — not "big savings" or "great deal"
[ ] Urgency mechanism is explicit: named deadline OR named quantity remaining
[ ] Link uses your branded short domain, not a generic shortener
[ ] STOP opt-out keyword is present (required for SMS, best practice for push)
[ ] Message character count is verified — under 160 for ASCII, under 70 if emojis are used
[ ] Brand name appears in the first 40 characters
[ ] A conditional "already purchased" suppression is active if the message is triggered by cart behavior
[ ] Opt-out rate from the previous send to this segment was below 0.5%

Segmentation and Personalization

Map your subscriber list to RFM tiers, define behavioral trigger logic, and document your lifecycle stage message tracks.

Exercise: Build Your RFM Segment Map

Using your platform's segmentation tools or a customer data export, define the qualifying criteria for each of the five core RFM segments for your business. Your thresholds will differ from generic benchmarks — use your own order history data to set percentile-based cutoffs.

• What is the recency cutoff (days since last purchase) that separates your "active" from "at-risk" customers based on your actual purchase cycle? Show how you calculated this threshold.

• What minimum order count defines a "loyal" buyer for your brand? Pull the distribution of order counts from your customer export and identify the natural break point.

• For each of your five RFM segments, write the primary message goal and the specific type of offer or content that segment should receive — be concrete, not generic (e.g., "early access to new arrivals" not "exclusive content").

• Which segment has the largest membership in your current subscriber list? What does this tell you about where your acquisition and retention programs are succeeding or failing?

Worksheet: Behavioral Trigger Flow Map

Document the configuration for each behavioral trigger flow you plan to build or already have running. Fill in one row per trigger event.

Trigger event (e.g., abandoned checkout, post-purchase day 4)

Channel (SMS / Push / both)

Delay after trigger fires (minutes/hours)

Suppression condition (e.g., "suppress if email flow sent in last 60 min")

Message 1 text (full copy)

Message 2 text (full copy, if applicable)

Inter-message delay

Purchase-check conditional between messages (YES/NO)

Current click rate for this flow

Current conversion rate for this flow

Last reviewed/optimized date

Checklist: Segmentation Health Checklist

- [ ] RFM segments are defined with specific numeric thresholds, not relative labels
- [ ] Segment sizes are reviewed monthly and recalibrated if a tier has grown or shrunk by more than 20%
- [ ] A "never purchased" SMS subscriber segment exists and receives education-first sequences
- [ ] A sunset segment is defined for subscribers with no click and no purchase in 120+ days
- [ ] Behavioral trigger flows have purchase-check conditionals to suppress messages after conversion
- [ ] A global per-subscriber frequency cap of no more than 1 message per 24 hours is configured
- [ ] Cross-channel suppression is active: SMS opt-outs are reflected in push segments within 1 hour

Automation Flows, Analytics, and Channel Integration

Audit your automation flows, build a KPI dashboard, and document your multi-channel orchestration calendar.

Exercise: Revenue Audit: Calculate RPM for Each Live Flow

For each automated flow and each campaign send in the last 90 days, calculate the revenue per message (RPM) and compare it against the industry benchmarks from the course. Identify your top-performing flow and your lowest-performing flow.

• Pull the total attributed revenue and total messages sent for each flow from your platform. Calculate RPM = revenue / messages sent. Which flow has the highest RPM? What structural elements of that flow explain the high performance?

• Which flow or campaign has the lowest RPM? Is the underperformance explained by copy quality, segment selection, timing, or a mismatched offer? State your diagnosis and a specific fix.

• Compare your opt-out rate across flows. Is any flow generating opt-outs above 0.5%? What change would you make to the message, segment, or timing of that flow to reduce opt-outs?

Worksheet: Weekly Channel KPI Dashboard

Record your key metrics for each channel every week using this worksheet. Fill in actual figures — leave calculated totals blank for your platform or spreadsheet formulas to handle.

Week ending date

Channel (SMS / Push / Email — one row per channel per week)

Total messages sent

Total delivered

Total clicked

Click rate (clicks / delivered) — calculate in spreadsheet

Total attributed revenue

Revenue per message (RPM) — calculate in spreadsheet

New subscribers this week

Opt-outs this week

Opt-out rate (opt-outs / delivered) — calculate in spreadsheet

Net list change (new subscribers minus opt-outs)

Notes (any campaigns, launches, or anomalies this week)

Checklist: Multi-Channel Integration Readiness Checklist

[ ] Each channel has a defined role: email for brand depth, SMS for urgency, push for ambient alerts
[ ] A product launch orchestration calendar template is built with channel sequence and suppression rules
[ ] Cross-channel suppression is tested: a test opt-out in SMS removes the subscriber from push marketing segments
[ ] Attribution windows are identical across all channels in reporting (same click window, same delivery window)
[ ] A unified weekly KPI report covers click rate, RPM, and opt-out rate for all three channels side by side
[ ] Sunset flow is deployed for SMS subscribers with no click in 180 days and no purchase in 120 days
[ ] All four core flows are live: welcome, abandoned cart, post-purchase upsell, and win-back

Your Action Plan

1. Complete the compliance audit worksheet and fix every missing consent element at each opt-in touchpoint before sending any marketing messages
2. Score at least two SMS platforms and one push platform using the evaluation scorecard, select your stack, and create your accounts
3. Deploy your first opt-in unit (exit-intent popup or checkout field) with compliant language and a live welcome flow that delivers within 2 minutes
4. Write your first three campaign messages using the four-part SMS formula and run them through the message quality checklist before sending
5. Define your five RFM segments with specific numeric thresholds based on your own customer data and create saved segments in your platform
6. Build and test your abandoned checkout SMS flow with a purchase-check conditional and cross-channel suppression logic
7. Set up your weekly KPI dashboard and record your first week of data for click rate, RPM, and opt-out rate by channel
8. Define channel role assignments for email, SMS, and push and document your suppression rules in writing before your next multi-channel campaign
9. Run your first A/B test on an offer framing variable with a properly calculated minimum sample size and declare a winner only at statistical significance
10. Schedule a quarterly review of RFM segment sizes, sunset flow performance, and platform costs to keep your program healthy and cost-efficient