TextUs

Sales Texting Playbook for Salesforce Teams

Converted

Contract's signed and submitted. Excited to make this official!

Just saw it come through. Thank you! Really excited to partner with you.
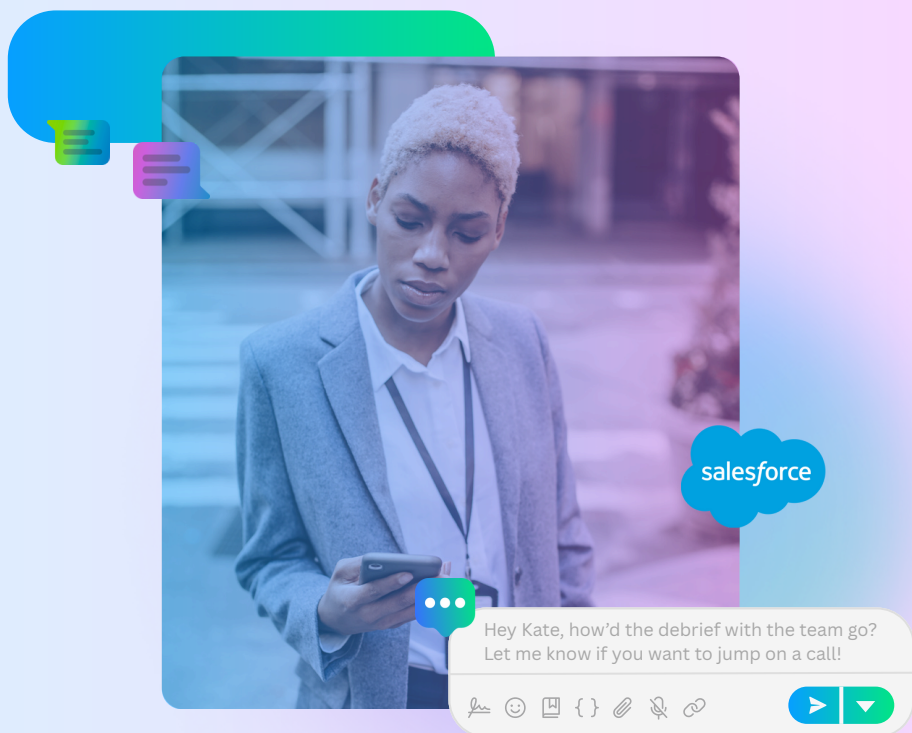
Same here! Let us know next steps.

Will do! Kickoff details will come your way shortly.

Introduction

Sales is evolving, and the way we communicate with prospects and customers makes all the difference. With SMS emerging as a powerful channel for real-time engagement, integrating it into your Salesforce gives you that boost your pipeline needs. TextUs takes the complexity out of the equation, enabling seamless, two-way texting directly within Salesforce. Whether you're streamlining workflows, increasing response rates, or enhancing customer relationships, the strategies and templates in this guide will empower your team to achieve measurable success.

salesforce

Hey Kate, how'd the debrief with the team go? Let me know if you want to jump on a call!
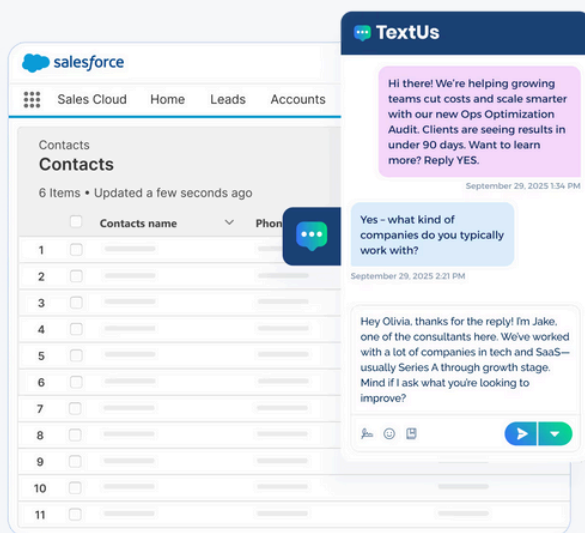
Why Texting Is the Missing Link in Your Salesforce

As a sales professional, you probably face the daily battle of getting someone to respond. Waiting for that prospect to answer the phone or reply to that 3rd follow-up email. But prospects today are bombarded by **calls and emails**, making these channels more difficult to penetrate. More than **70% of prospects** don't answer sales calls, while emails struggle to crack a **6% response rate**. Text messaging tells a different story. With **response rates reaching 45%**, SMS gives sales teams a reliable way to reach people and get the conversation rolling.

Still, scaling **SMS in a sales** workflow comes with its own headaches. Switching between platforms or manually logging every message you send slows everyone down and makes it easy to lose track. With TextUs, you **bring texting right inside Salesforce**, so your team can keep their momentum and stay organized.

This **Sales Texting Playbook for Salesforce Teams** is designed to help you put SMS to work in the right moments—whether it's confirming meetings, following up on demos, nudging deals forward, or reconnecting with prospects who've gone quiet. In this playbook you'll find ready-to-send templates (with proven timing and rationale), best practices, and tips to weave SMS into your daily routine without friction.
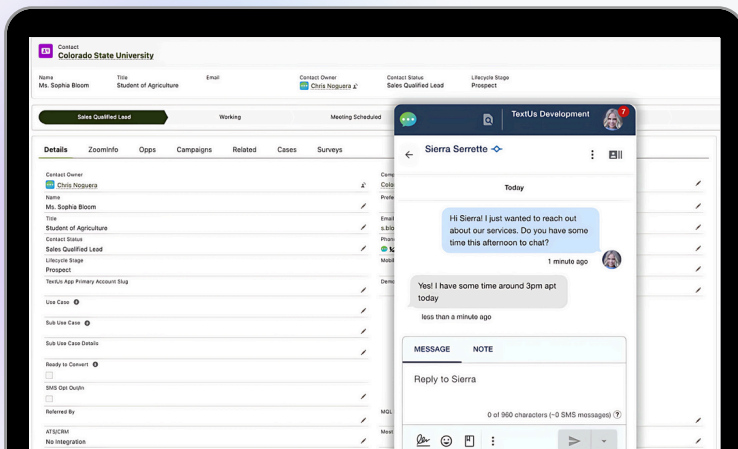
If you're leading or supporting a team as an SDR, AE, Sales Coordinator, or Sales Manager, reaching buyers in meaningful ways is a top priority. This playbook gives you the tools, strategies, and tech insights you need to drive conversations, build credibility, and convert more deals all within Salesforce.

Ready to reimagine your sales communications?
Let's see what SMS can deliver.

5 High-Impact Text Templates for Key Sales Moments

Message templates speed up communication and ensure consistency for sales teams while still allowing room for personalization. Below, we'll walk you through high-impact templates for essential sales moments. For each, we've included guidance on when to send, why the message works, and tips for tailoring it to your audience.

1. Meeting Confirmation

Making an immediate personal connection with your prospects can set the tone for a positive experience. A simple text confirming a meeting reassures your prospect that you're attentive and organized before your first conversation takes place.

When to Send
Send within the first 5 minutes of the meeting being scheduled, while the prospect is still engaged.

Why It Works
These messages set clear expectations and confirm commitment. They also build trust, showing that you're organized and value their time.

How to Personalize It
Include the contact's name, the date and time of the meeting, and a note about what you'll discuss to make the message relevant.

Templates

1. Hi [First Name], confirming our meeting scheduled for [Day], [Date] at [Time]. We'll discuss [specific topic]. Looking forward to it! Please reply if you need to reschedule.

2. Hi [First Name], just a quick reminder about our meeting on [Day] at [Time]. Can't wait to chat about [specific topic]! If anything changes, feel free to text me here.

3. Hi [First Name], excited to connect on [Day]! We'll go over [specific topic]. Meeting is set for [Time]. Please reply with a "👍" to confirm.

2. Meeting Reminders

Staying top-of-mind on the day of a scheduled meeting is key to reducing no-shows. SMS meeting reminders cut through inbox clutter and help ensure your prospects are prepared and engaged when it's time to connect.

When to Send
Send your reminder 1-3 hours before the scheduled meeting. This gives your prospect ample notice while keeping the appointment fresh in their mind.

Why It Works
Timely reminders show professionalism and respect for the contact's schedule. They significantly reduce the likelihood of missed meetings, which translates to a more predictable pipeline and more efficient use of your team's time.

How to Personalize It
Address the contact by name, restate the meeting time, and optionally reference a topic or agenda item to add relevance. You can also share the meeting location or a link if applicable.

Templates

1. Hi [First Name], just a quick reminder that our meeting is today at [Time]. Looking forward to connecting!

2. Hi [First Name], friendly reminder for our meeting at [Time] today. If you need to make any changes or have questions, please reply here.

3. Hi [First Name], we're set to meet today at [Time]. If anything comes up or you need to reschedule, just let me know. See you soon!

3. Demo Follow-Up

After a meeting, your prospects are more familiar with your name and more likely to continue engaging in conversation. Capitalize on the momentum after your conversation by sending your prospect a follow-up SMS.

When to Send
Send immediately after the demo or within the first 3 hours.

Why It Works
Following up demonstrates attentiveness and reinforces key points discussed during the demo. It also opens the door for questions or next steps.

How to Personalize It
Reference something specific from the demo, like a feature that sparked interest or a unique challenge the prospect shared.

Templates

1. Hi [First Name], thanks for joining today's demo! It was great discussing [specific feature or benefit]. Do you have any questions? I'm happy to help!

2. Hi [First Name], I really enjoyed our demo earlier! Excited to see how [specific feature] will benefit your team. When can we connect to discuss next steps?

3. Hi [First Name], following up after our demo today. [Specific feature or solution] could really make a difference for [their specific challenge]. Would love to hear your thoughts!

4. Re-Engagement / Ghosted Lead

Every sales rep knows the frustration of being ghosted. Prospects get busy or put their buying on the back burner. Using SMS to reignite a conversation is a noninvasive and simple way to stay connected even if the momentum has slowed down.

When to Send
Send this when a prospect hasn't responded in a week or two. Timing can vary based on your pipeline, but aim for a balance between persistence and respect.

Why It Works
These messages reignite interest without coming across as pushy. A soft and friendly tone often encourages replies.

How to Personalize It
Mention a previous interaction or offer additional value, like new insights, relevant resources, or updates.

Templates

1. Hi [First Name], haven't heard back—just checking in to see if you have any updates. I'd love to reconnect when you're ready.

2. Hi [First Name], wanted to follow up after our last conversation about [specific topic]. Any thoughts? Happy to answer questions or revisit whenever works for you!

3. Hi [First Name], I came across a resource on [specific topic] that might interest you. Thought I'd share it! Feel free to reply when you have a moment to catch up.

5. Deal Nudging

Closing deals requires finesse, and often a subtle nudge is all that's needed. A concise SMS can be the gentle reminder your prospect needs to finalize a scope or provide a signature, avoiding overwhelming them while still providing that crucial push.

When to Send
Send this message when you're nearing the close of a deal but need a little extra push, such as finalizing details or gaining necessary approvals.

Why It Works
These messages emphasize urgency and value without being too aggressive, helping prospects take the next step in their decision-making process.

How to Personalize It
Acknowledge where they are in the process, reiterate the value of your solution, and include a clear call-to-action for next steps.

Templates

1. Hi [First Name], just touching base to see where you're at with [specific product or solution]. I'd love to help you get started and answer any final questions. When works to connect?

2. Hi [First Name], I know we're close to wrapping things up on [specific solution]. Excited to help [their company] achieve [key benefit]. Any updates on your end?

3. Hi [First Name], I wanted to share that we're offering [incentive if applicable] for new clients this [timeframe]. Perfect timing to get started! Can I answer any questions before we finalize?

SMS Best Practices for Sales Teams

Effective SMS strategies can transform the way sales teams connect with prospects and customers. Unlike emails or calls, text messaging offers a direct and immediate channel for communication. But tapping into this power requires a thoughtful, strategic approach. Below are **SMS best practices**, designed to help sales teams build trust, encourage engagement, and drive better results.

1. Keep Texts Under 160 Characters

Short texts are effective texts. They show respect for the recipient's time and fit within a standard SMS limit. Messages under 160 characters ensure brevity while maintaining clarity, making it easier for contacts to quickly understand the value or action you're presenting.

2. Don't Pitch—Converse

People value authenticity. Focus on fostering genuine two-way communication and creating a space for dialogue rather than pushing a hard sell. This approach reduces resistance, builds trust, and opens doors for more meaningful conversations.

3. Always Offer Value or a Next Step

Every message you send should serve a purpose—whether sharing a useful resource, providing essential information, or directing the recipient to take a specific action. Without value or a clear call-to-action, texts risk being ignored.

4. Respect Opt-Outs

Maintaining trust means respecting your audience's preferences. If a **recipient opts out** of communications, honor their decision immediately and without question. Not only is this a legal requirement, but it also demonstrates your commitment to respectful communication practices.

5. Match the Tone to Your Brand

Consistency builds trust. A tone that matches your brand identity reinforces credibility, while one tailored to your industry resonates more deeply with your audience. Your SMS communication should feel like a natural extension of your brand. Adapt your tone to align with your industry and audience expectations.

✔ Event Registration Campaign

Thank you for joining our event, I can't wait to see you! Anything specific you'd like us to follow up on?

Send campaign

By integrating these key best practices, your Salesforce team can transform SMS from a basic communication method into a sophisticated, highly effective engagement channel. These guidelines will help your team achieve better results while respecting your audience's time and preferences.
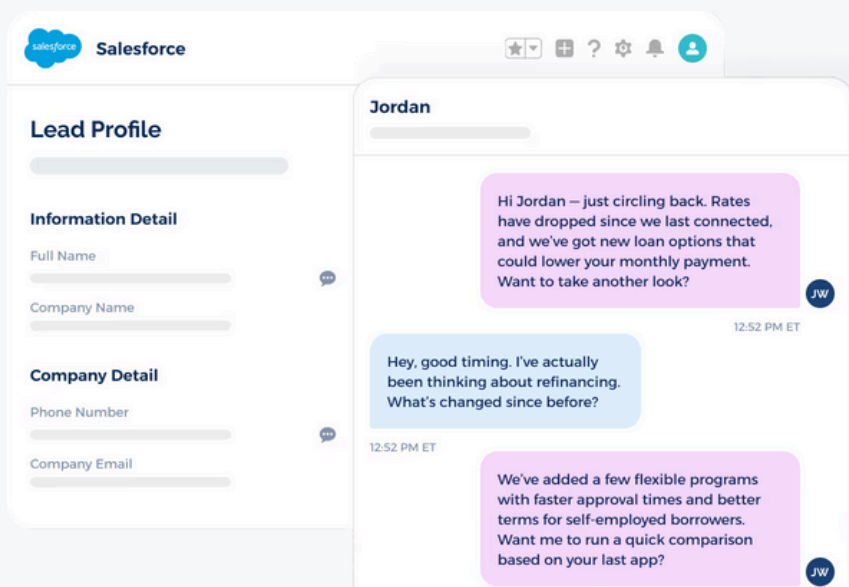
How to Use TextUs Inside Salesforce

Sales teams rely on efficiency and integrated tools to stay connected with leads and customers. TextUs for Salesforce helps to simplify SMS communication, eliminating the need to juggle multiple platforms or extra tabs. Here's how you can use TextUs effectively inside Salesforce and why modern sales teams love it.

One-Click Texting from Any Lead or Contact Record

With TextUs, you can send text messages directly from any Lead or Contact record in Salesforce. There's no need to toggle between systems or copy and paste numbers. A simple, intuitive messaging feature is built right into your Salesforce instance.
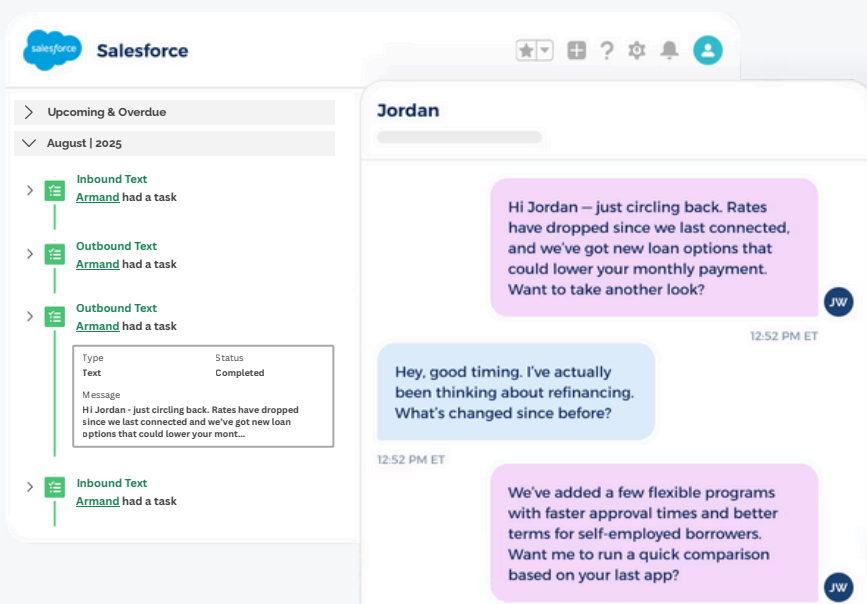

Why This Matters:

Quick access to texting ensures your communication remains immediate and efficient. Whether you're confirming meeting times, sending follow-up messages, or responding to inquiries, one-click texting helps you connect faster. This keeps your prospects engaged and your sales momentum strong.

2-Way Message Threads Auto-Logged in Salesforce

TextUs enables two-way text conversations that are automatically logged in Salesforce. Each message—whether sent or received—is automatically recorded under the relevant Lead or Contact, giving you a complete view of your interactions.

Why This Matters:

Manually tracking communication significantly slows you down and can lead to errors. With auto-logging, you maintain accuracy and organization without the extra effort. That way your sales and customer service teams always have up-to-date information when engaging with prospects or clients.

Text Template & Scheduled Messages

TextUs simplifies communication further by providing customizable text templates for your team and the ability to schedule messages. Whether you need to send reminders, follow-ups, or promotional updates, templates save time while keeping your communication consistent. Scheduled messages allow you to reach that prospect at the right time.
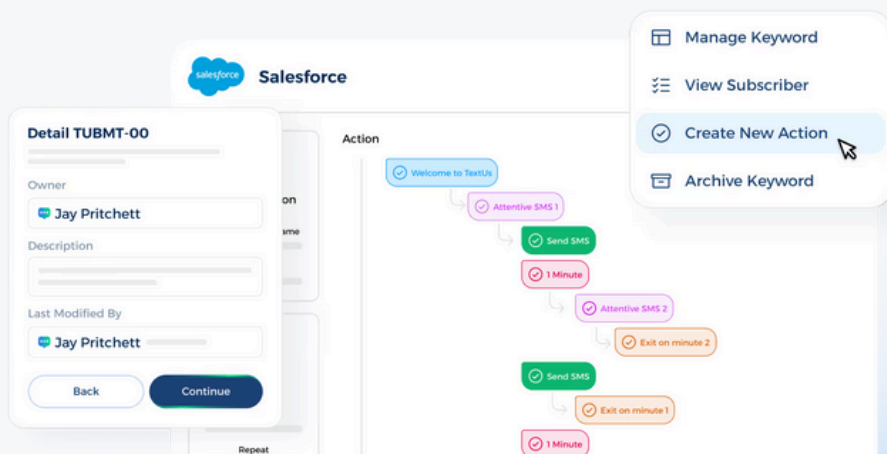

Andrew Davidson

To : Andrew Davidson <555-222-5789 × Add re

Are you still ru

Yes! We're still running the 15% discount.

2 minutes ago

Test message goes here

Signature Name

Send Later

Date

Time

Cancel   Schedule

Why This Matters:

These features empower your team by combining efficiency with personalization. Templates save time for repeated tasks and scheduled texts enhance **strategic timing**. The result? More meaningful interactions and higher response rates.

Use SMS in Workflows to Automate Key Touchpoints

TextUs integrates into **Salesforce Workflows**, allowing you to automate SMS at critical stages of the sales process. Whether it's sending an appointment reminder, following up on a missed call, or nudging a lead closer to conversion, automated SMS ensures timely, consistent communication without lifting a finger.

Why This Matters:

Automation removes manual steps, reduces delays, and frees your team to focus on higher-value tasks. It also ensures every prospect receives timely, consistent messaging, even during high-volume periods. This is key for scaling your sales efforts and making sure nobody slips through the cracks.

Get Started with TextUs for Salesforce

Transform the way your team connects with prospects and clients by integrating SMS directly into Salesforce. TextUs enables real-time engagement, seamless workflows, and automated texting—all from within the platform you already use every day.

Experience the Difference:

- Engage customers instantly with two-way messaging.
- Automate key touchpoints to save time and drive results.
- Simplify your workflow with hassle-free integration.

Don't just imagine the possibilities—experience them. Book a demo today and see how TextUs can revolutionize your sales process. Take the first step toward smarter, faster, and more connected communications.

Smarter Texting

Bigger Impact

Get a Demo

TextUs