



The Sales Team Playbook for Text Messaging

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INTRODUCTION

What's in this book?

Your sales team is what keeps business coming in.

You play a crucial role in an organization's bottom line, and yet, there are constant hurdles you're looking to overcome so you can close more deals and bring in even more business.

In this guide, we'll dive into the state of sales today and look at some of the biggest obstacles facing the sales organization.

We'll discuss how reimagining communication with customers can help put your team on the fast track to closing more deals.

With the aid of some specific examples, we'll see how your team can use texts to catch and keep the attention of your customers and prospects.

We will cover what makes a robust SMS solution and how integrations with other platforms can be the most powerful tools you have in your sales arsenal.

Finally, we'll round it all out with some amazing real-world examples that show just how SMS can improve sales performance and ROI overall.

Happy reading!

The Avochato team



Table of contents

PART I: The state of sales	4
Reimagine sales communications	4
Manage multiple relationships	5
Consider the whole customer lifecycle	7
Give customers what they want	7
PART II: How to use SMS for sales	9
Follow up on new leads	9
Take live chat conversations offline	10
Text warm leads	11
Close more deals, faster	11
Improve sales comms effortlessly	12
PART III: Supercharge sales with SMS integrations	14
Salesforce integration	14
Slack	15
Microsoft Teams	15
Zapier	16
PART IV: Real-world sales teams that are crushing it with SMS software	17
Twiddy lifts conversions by 20 percent	17
whLaw sees 40x increase in ROI	18
Third-party sales company converts leads at scale	19

The state of sales

One of the biggest challenges sales teams face is simply getting the attention of prospects. Nurturing prospects through the sales process can be difficult, too, but if you can't get their attention and hold it long enough to form a relationship, you don't have anything to nurture.

You need better ways to cut through the noise and show your prospects that you are here to help them. A good sales team knows how your solution can help them, and you know all the right strategies to let them know that. But sometimes sales calls are ignored and sometimes emails go unread. (Actually most emails go unread—[about 80 percent of them](#).)

You need another way to reach prospects that can up the impact of your sales comms.

Reimagine sales communications

One way you can cut through the noise and make sure your sales message is seen is to simply find the method of communication that works best for your prospects. A sales call is sometimes just what you need, but it's not always the way your prospects want to communicate with you. You may find yourself getting voicemail often from a prospect who is too busy or too uninterested to have a phone conversation with you.

Email is also effective in some cases, but it can be slow and agonizing to wait for a response that may never come (if your email is ever even read).

What you need is a third way to communicate—a way that meets prospects halfway. You need a channel that lets you get in touch immediately, knowing with almost absolute certainty that your message will be seen, and having a pretty good chance that you'll get a response.

If your message is seen, you have a foot in the door. You'll be able to get their attention for a few moments. Sometimes, it's all you need. If you get a response to your message, your foothold gets even stronger, and you can actually start a conversation with the prospect. You can begin to build the relationship.

If you're only relying on voicemails that go unanswered or emails that seem to disappear into the abyss, you won't stand out, let alone get their attention. You'll be drowned out by the noise instead of swimming above it.

Text messaging is a third way that reimagines what it means to get in touch with sales prospects. Text messages have a near perfect open rate, about [98 percent](#), which means you can pretty much count on catching the attention of your prospects if you send them a text

Manage multiple relationships

Only once you snag their attention can you move onto your next job, which is to show them how you can help them.

This is where your talents as a salesperson can shine. You have someone's attention, now it's up to you to keep it. That requires deep, empathetic listening and the ability to help the prospect navigate through their own pains until ultimately, they see how well what you have to offer can meet their needs.

Yes, you're a sales rep, or maybe even a sales leader, but your job is ultimately to turn prospects into customers by showing how what you have to offer helps them in some significant way. By nature of the process, you can sometimes be responsible for guiding them through their own pain points and uncovering their needs.

All this has to be done tactfully and with patience. And, it has to be done without putting all your efforts into one prospect. You have lots of other leads to manage, and you can't afford to focus everything you have on one.

DID YOU KNOW...



98%
of SMS messages
are read.



45%
of messages
are replied to.



90 sec
is the average
time to respond.

Choosing the right communication channel can't help you approach your sales in the best way, but it can help you easily manage all your prospects in one place. Chances are, you're not just pursuing one potential customer but multiple prospects at once.

Let's face it, the more prospects you can manage at one time, the more business you could potentially secure. But, when you've got lots of customers, it can be overwhelming because of the sheer amount of work required.

Wouldn't it be great if you could somehow grow your prospects list, and bring in more deals, without losing your mind or sacrificing the impact of your sales message?

You need a way to manage customer relationships at scale. This is where a communication channel like SMS comes into play. Imagine the time it takes you to play phone tag with a prospect. Now, imagine you send them a text instead. You send out your message instantly, getting their attention and letting them know what they need to know in one instantaneous way.

You have a 98 percent chance that they'll read your message and a [45 percent chance they'll respond](#). [Nine out of ten people](#) will read a text within the first three minutes, though it takes an average of just [90 seconds to get a response to a text message](#). Email, on the other hand, is agonizingly slow by comparison: a whopping average of 90 minutes to get an email response, and that's if you get one at all. (The response rate for email is a [comparatively abysmal 6 percent](#).)

With this speed, you can juggle multiple prospects without wasting time leaving voicemails, waiting for email responses or dealing with missed calls. You can count on a quick response almost half of the time, and then you can either escalate the prospect or move onto the next. Either way, using a quick and convenient channel like text to reach prospects gives you more time and space to scale your sales list without worrying about overwhelm.

The thinking is, you don't just want to manage more prospects. You want to close more deals. In this case, speed matters.

Efficiency matters.

The faster you can close a deal, the sooner you can work on closing the next one. Now, think about all those hours wasted on waiting and imagine if you could cut the wait time substantially. You could know which deals aren't going to happen and which are so much faster, which means you'd be able to focus your energy and time in the most efficient way.

Even if half of your leads get back to you within two minutes of your message, that's 50 percent of your prospects one step closer to closing a deal with you. And it took minutes, not hours, not days, not weeks. That level of efficient sales can help you close deals faster so you can move right on to the next.

SMS isn't going to make you a more talented salesperson, but it can give you the tools to speed up the process and make you a more productive salesperson. That's where the money is.

Consider the whole customer lifecycle

Once you close deals, today's sales team isn't done. It's a combined effort to manage customer relationships, but sales teams are often responsible for the upsell and cross sell tactics that bring in more value per customer.

Text messages can help improve the upsell in a few different ways. First, they can reach the customer faster and with more efficiency, which is great for a sales team with multiple customers to manage. Also, using SMS to upsell has the added benefit of re-humanizing your business without making it inconvenient for the customer.

You might not be able to reach busy customers as effectively with phone or email, but making a personal connection via text could be the ideal way to remind them about your relationship. Texts don't expect too much, either. They're not like phone calls that can be confrontational and are easy to ignore.

Texts can be informal yet personal. They can get a customer's attention faster and better, while still getting your message across. Just like new business, upsells can happen faster with SMS.

Give customers what they want

We've mentioned email and phone calls a number of times already, and it's important to know that each of these means of communication do have their place in today's sales environment.

However, any sales that are being done today are being done with a modern audience. Yes, millennials actually think phone calls are a waste of their time. But it's not just millennials. Actually, [69 percent of people of all ages](#) say they'd rather get a text than a call from a company they don't know. (You won't likely be texting customers who don't know you, but this is a good representation of the idea that demographics aren't much of a barrier when it comes to SMS.)

DID YOU KNOW...

63%

of consumers say they'd switch to a company that offered SMS as a channel.



How to use SMS for sales

It's a fine line: Getting your leads to convert without pushing too hard and coming across as desperate or annoying. This is the line good salespeople walk every day, but there's only so much flexibility if you're relying on old communication technology.

Text messaging can help you overcome this obstacle by helping you communicate in a way that won't turn your prospects off but will still keep the conversation going. To avoid annoying your customers or prospects, you could do one of two things.

You could stop reaching out to them altogether. This will solve the problem of overkill sales that turn people off. But it won't convert leads to customers. It will do the opposite and could cause you to lose business.

The other action you could take is to change the way you reach out. If you're finding that a lot of prospects are ignoring your calls and emails, try an approach that's friendly and non-threatening while direct and clear at the same time. This is where SMS comes into play, making a powerful addition to your sales comms.

Here are some scenarios that show sales teams using text messaging to grab and keep their prospects' attention in the real world:

Follow up on new leads

Let's say someone has just filled out one of the online forms on your website because they wanted to read an extensive guide marketing created.

You or someone on your sales team is waiting for this exact moment to reach out and see if there's anything else you can help them with. Often, a sales rep will give a prospect a call within minutes of filling out a form, which can land some deals, but only if they are already very interested.

Sometimes, a prospect is ready to have a phone conversation with someone at your company. But sometimes, they just want to read the guide. The person who only wants to consume the content for now might ignore your phone call. Reaching out with a text message, on the other hand, can let you follow up on new leads without the pressure of a sales call.

Here's what your text might look like in this case:

Hi Rajesh, this is Daniel from Awesome Company. I saw you downloaded our Guide to Being Awesome. Let me know if you have any questions. We have some other great content you might find useful once you finish with the guide.

Here's a recent post:

<https://blog.avochato.com/blog/-6-ways-your-business-benefit-from-sms-text-messaging-services-plus-tips>

You can take any approach you want with your follow-up, and you can, of course, base it on the information you get from the form-fill. But, sending a text is going to be the best way to just about guarantee your follow-up message will be seen and start the sales conversation. Why not a phone call? It might work to call, but sometimes it's better to nurture a new lead through other means so you don't scare them off too early. Why not an email? The point of following up is to engage your prospect in conversation. Email is too slow, and you can't always count on your email message being read.

Take live chat conversations offline

If you have a live chat widget, you are probably capturing leads who have already done their research and are interested in learning more about your business from a real person. Great! Your job, as a sales rep, is to help that person go from lead to customer. This is why, depending on the content of the conversation, of course, you should be ready to receive leads that have come through your online chat widget. These are prospects who are reaching out to your company with some prior knowledge and interest, so they'll likely pass quickly through marketing and into your hands.

Your best bet is to try to keep the conversation going via text message, even after the prospect has left your site. Imagine someone visits your website, asks a few questions via chat, and then they leave. Normally, this would be the opportunity to send them an email to check in or just leave the relationship alone until they reach out again. But, what if your sales team could reach out the next day with a text message? You could try to answer all their questions and give them the info they need while maintaining informal, pressure-free communication. This is an interested prospect, and however you can keep the conversation active, you should. Here's an example of a follow-up text message you might send to a lead who has come in through live chat:

Hi Izem, my colleague Laiana told me you were interested in Product X. I'd be happy to answer any questions for you. How can I help?

Why not a phone call or an email? Bringing leads from live chat to SMS, when they're integrated into the same platform, can be seamless. Reaching out via text can feel like a continuation of the conversation, since it will look similar to the prospect if they're on mobile, and if they're not, texting at least has the same back-and-forth conversational feeling as live chat so it's not too abrupt a departure. Just make sure you have the proper opt-in permissions in place on your live chat before you start texting.

Text warm leads

Break out your deep listening skills, and dig into your notes. Try to remember exactly what this prospect's needs were when you last spoke with them, and see if you can create a text message that will help them start to see a solution. This is where sending content that explains how your product addresses their exact needs will come in handy. Here's what your text could look like:

Hi Marta, I wanted to share this recent blog post with you about how to manage your remote maintenance team. You mentioned that's one of your biggest issues right now, and I thought it might be helpful:
<https://blog.avochato.com/the-benefits-of-texting-your-field-team-avochato>

Why not a phone call? This is just a small contact to show your prospects that you still care about them and remind them you have solutions for them. Interrupting Marta's day with a call just wouldn't be appropriate. Why not an email? You can send content via email, but it might not be effective since email's average open rate is only 20 percent and its response rate is a mere 6 percent. You want her to read it, right?

A message like this only really works if you're going to send it via text. It's short and to the point, but it's casual helpfulness might go a long way to nurturing your already-warm lead.

Close more deals, faster

The rate at which you close deals will depend on your industry and the nature of your business. Some direct to consumer products can close quickly with a text blast, personalized to each of their leads, that offers an exclusive discount. Others will have to schedule a demo or a meeting to chat further about the product before a deal can close.

Regardless of how your business is able to sell, your job is to help get it done. Using text messaging to help you means you can get more deals done faster since you don't have to wait as long for responses that may never come. You'll be able to get a sense of how a prospect is feeling towards your brand after one or two messages. You can keep the

conversation going with those who seem interested, and you can either choose not to pursue or put on hold the prospects who go cold.

Here are two examples of very different deal-closing text messages that you could use to get one more step towards finalization. Note how different they are in their approach, which highlights the variations that you'll need to take into account after you consider your industry and the style your customers expect.

Hi Victor, I'd love to schedule a meeting next week so we can show you the features we talked about in action. When are you free?

Hey there Lin, a monthly membership is currently 25% off for anyone who subscribes to our text messages. Use code TEXT to get the discount before Tuesday at midnight: <https://www.thisproductisawesome.com/discount>

Text messages can be used to set up the deal close in lots of different types of industries. More than phone or email, SMS can get your prospects' attention right away and keep things moving quickly. And faster sales cycles could lead to more overall sales.

Improve sales comms effortlessly

Regardless of how you decide to implement SMS in your sales processes, there's little doubt that it can be the most efficient and effective channel available. But there's a barrier that often stands in the way of sales teams that want to start texting their leads but can't: effort.

Getting set up with a text messaging software that can help you close more deals faster shouldn't be a hassle. It should be one of the easiest investments you make for your sales teams, and you should be reaping the benefits right away.

There are lots of reasons you should use a text messaging software to message your prospects and customers instead of letting your team text customers from their personal phone numbers. Some of the issues with choosing not to use a centralized software include putting your employees' personal phone numbers out into the public, not having consistency when reaching out (a big problem if one of your team members ever goes on vacations or takes another position), a lack of oversight and metrics, and just general liabilities.

In other words, texting customers from your personal device isn't advised for businesses that want to create a trustworthy, consistent and positive customer experience.

The problem is, some text messaging software out there is bulky and complicated. Sometimes you're required to have some coding knowledge or get your development team involved in the process—all just to set up a way to text your customers. Texting is something most of us do every day of our lives. It seems like it should be easy, but so much software out there makes it far more complicated than it needs to be.

A text messaging software for business like [Avochato](#) makes it simple to get your team messaging prospects right away, no coding required, and only a few minutes of your time to get set up. With a software solution like Avochato, you can integrate your SMS system with other systems you already use, too, with no extra work required.

Texting should help enhance your sales performance, not cause frustrations.

DID YOU KNOW...

85%

of mobile device users prefer a text from businesses over phone calls or emails.

Texts have a

295%

higher response rate than phone calls.



Supercharge sales with SMS integrations

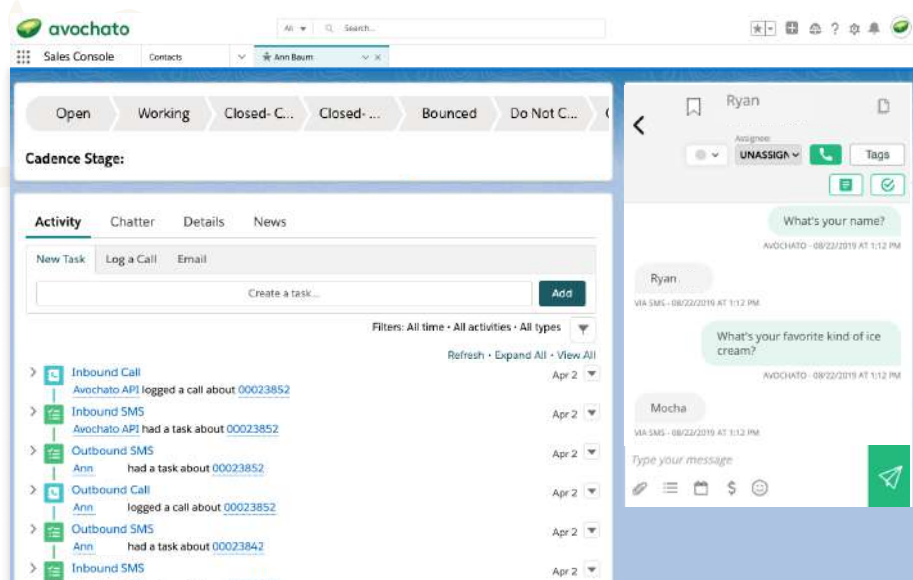
We've already established what including text messaging in your sales process can do for your customer and for your bottom line. But an SMS software that's simple to set up and intuitive to use should also come with integrations that can power your sales behind the scenes.

Integrations are the key to making sure your text messages are centralized within your business and work well for your team. The idea isn't just to add yet another platform to your list of siloed software that you use to do business. The idea is to integrate a platform, to fit it in like the missing puzzle piece that can help you step up your game.

Salesforce

One of the most powerful ways to give your SMS software strength is to connect it with your CMS. The most intuitive text messaging platforms for sales teams will come with a deep [integration with Salesforce that is beneficial in a number of ways](#). First, this connection has the potential to sync data between your SMS platform and Salesforce. With a high quality integration, your SMS software will automatically update contact information and other customer data right in Salesforce without you having to do a thing.

The right integration will also automatically log your text messages as activity on the SFDC object. This way, you can capture the history of every customer touchpoint throughout their lifecycle without missing a beat.



PRO TIP:

Integrate SMS with Salesforce to automatically sync SMS messages as activity and to have the ability to send and receive messages directly from the Salesforce interface.

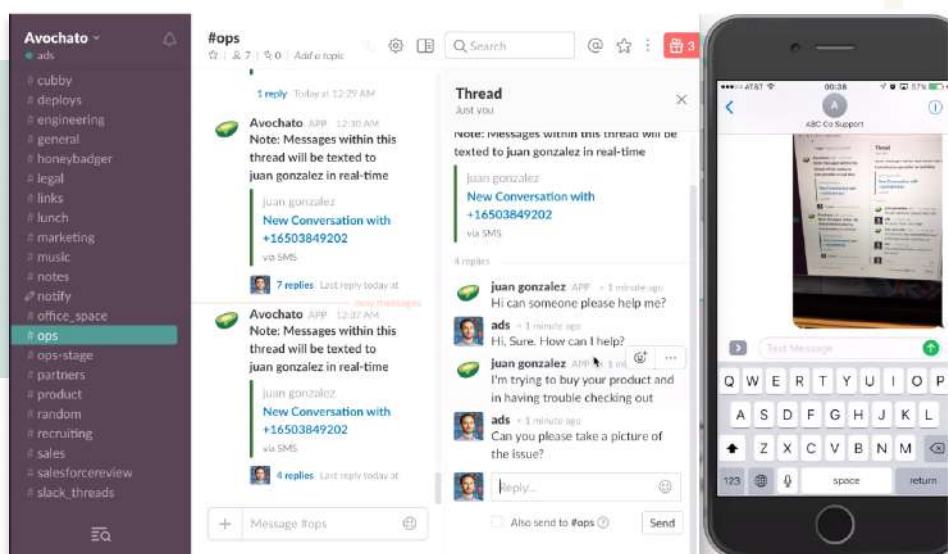
All that is necessary, but a truly well-developed integration will even let your team send texts directly from the SFDC interface. A great SMS software like [Avochato](#) should do all this for you, so you can make the sales process easier for your team without you having to lift a finger.

Slack

Integrations should go beyond Salesforce and include the tools your team uses every day to get business done. That's why you should consider text messaging software that integrates with other platforms like Slack. A robust Slack integration will allow your team to send texts right from within the Slack platform.

PRO TIP:

You can set up specific Slack channels to receive and send SMS messages from customers and prospects.

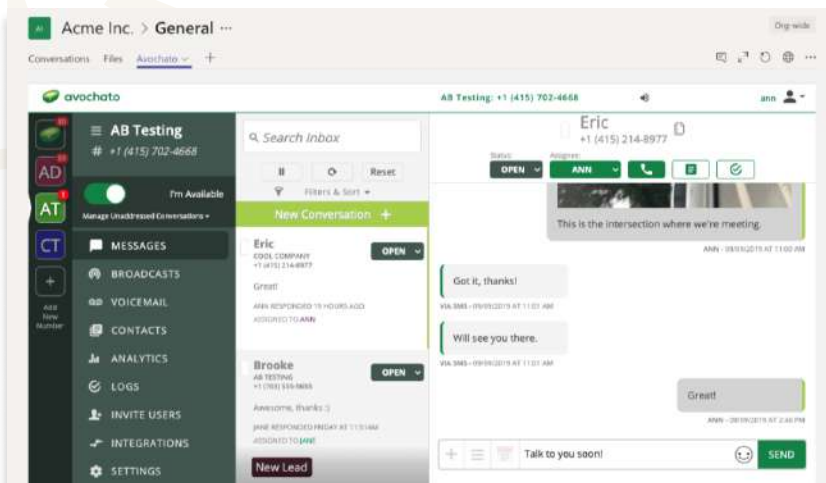


Microsoft Teams

Another useful integration is Microsoft Teams. It allows you to message customers without leaving Teams. The messaging history between your business and customers can be seen in real-time and added to any Teams channel. You can also schedule one-to-many messages directly from the Teams interface.

PRO TIP:

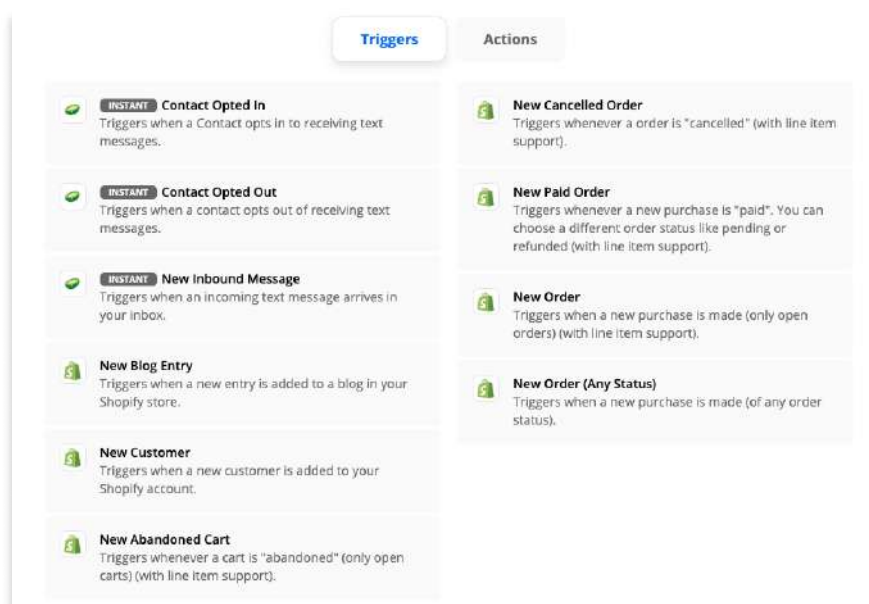
Integrate SMS with Teams to send and receive messages from Teams channels.



Zapier

Depending on your industry, there are a variety of different tools your team uses to get business done on a daily basis. That's why an integration with Zapier, which connects your platforms seamlessly with one another, should be an essential integration that's included with your SMS software.

There are lots of ways Zapier integrations can help enable sales. For example, Avochato, a text messaging platform built for business, can [integrate with Shopify via Zapier](#). This small integration has a huge impact, enabling you to follow up with reminder text messages to your prospects and customers when they abandon their shopping carts.



PRO TIP:

Zapier offers tons of ready to use Triggers and Actions to instantly connect your SMS inbox to thousands of apps and send messages based on certain criteria.

Real-world sales teams that are crushing it with SMS software

Twiddy lifts conversions by 40 percent

For Twiddy and Company, the leading vacation rental company in the Outer Banks of North Carolina, their guests are like family. And when you want to tell a family member about an upcoming vacation, you don't send an email that might get buried between newsletters and work updates. When Twiddy wants to reach their guests, they send them a text.

"It can be really, really hard to have conversations over email. With texting, we're able to drive conversions and to have one-on-one conversations with guests on their terms."

Mike Wilson, CFO

Texting means their sales team can have one-on-one conversations with potential and current guests, a strategy that drives more conversions.

The company saw at least a 40 percent lift in conversion just using texting as a channel.

Twiddy also implemented a "click to text" widget on their website, which drove massive conversion for prospective guests who wanted to learn more about the rental process.

As Twiddy grows its operations and moves to larger platforms such as Salesforce, they continue to leverage text messaging by using a robust Salesforce integration. The integration lets them seamlessly send text messages through Salesforce, and log the activities automatically.

RESULTS

40%

lift in conversions

Significant improvement

in customer and internal team satisfaction.

whLaw sees 40x increase in ROI

For whLaw, a leading law firm in Arkansas, client satisfaction is a top priority as the firm continuously scales. In order for a law firm to convert a lead into a client, a great first impression and a level of trust needs to be quickly established to stay competitive. wh Law knew they needed to be able to separate themselves from their competitors and realized SMS was the quickest and most immediate way to connect with a potential client.

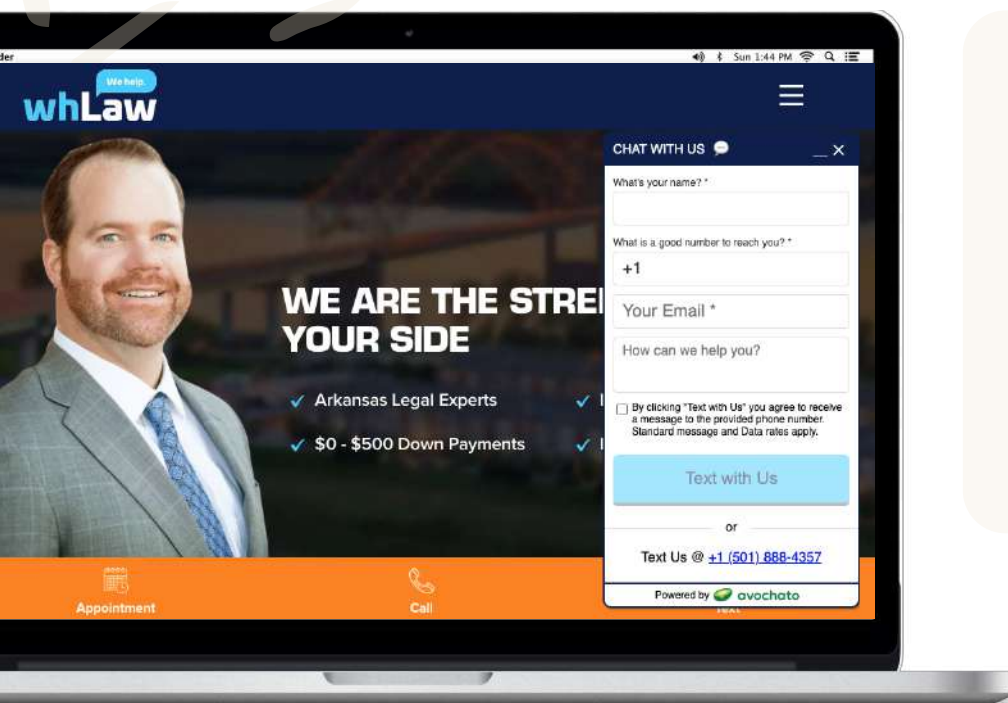
"With texting, we can automate many different processes we currently have in place, enabling us to quickly engage with a potential client."

Brandon Haubert, CEO

According to CEO Brandon Haubert, "a lack of communication between firm and client is the biggest pain point for many law firms. We knew that if we wanted to really set ourselves apart, opening up a line of communication through texting was the way to do it. The thing about calls is that you can't automate them, and emails can't compete with how immediate a text message is. We tried chatbots, but our prospects were turned off...With texting, we can automate many different processes we currently have in place, enabling us to quickly engage with a potential client."

Looking to increase their close rate, whLaw sought a solution that was easy to use, yet robust enough to integrate with their current systems and their system of record, Salesforce. A texting platform that would keep up with the firm's exponential growth was key.

In wh Law's first year of using live person texting, they saw a 40x return on investment, leading to six figures of new added revenue.



RESULTS

40x

increase in ROI

Six figures

of new added revenue

Third-party sales company converts leads at scale

One of Austin's top third-party sales companies uses text messaging to help one of their largest clients—a company in the gig economy space—nurture and convert inbound leads. They currently have a team of over 100 sales reps interacting with hundreds of leads a day over SMS.

Originally, the team was reaching out to leads via phone or texting them individually, but both options were very hard to scale. Implementing a business SMS solution was the perfect way to ensure that all leads were contacted in a timely manner—and that the messages were actually being read and replied to.

“Our reps are already in Salesforce all day. Avochato’s integration allows them to do everything in one single Salesforce screen, from checking lead information to actually sending and receiving SMS messages.”

They found a text messaging software that integrated with Salesforce, a tool the team of sales reps uses all day, every day. They have been able to do everything from one single Salesforce screen, from checking info on leads to sending and receiving texts from prospects.

Plus, all messaging activity syncs automatically to Salesforce, so it’s easy for managers to track and monitor all interactions. They can easily view their SMS data in Salesforce dashboards for premium visualization.

Finally, the team leverages SMS automation to send texts to leads based on certain criteria. The second a new lead is created in Salesforce, for example, an automated text message goes out to get the conversation started. If a lead hasn’t interacted in a few days, another message goes out to keep them warm.

RESULTS

Significant increase

in sales efficiency and faster time to first engagement.

100%

of leads contacted.

The speed to first engagement and regular check-ins are crucial to get sales closed faster, and they don’t require any manual effort from the team.

Since implementing SMS software, the team has noticed a huge improvement in efficiency, since text messaging makes it possible for one single rep to manage multiple conversations at once.



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