Texting with Total Expert

5 Tips to Get Started

1. Integrate
   - Activate Twilio in your account via the Integration Settings page.
2. Opt In
   - Customers need to opt in due to the Telephone Compliance Protection Act, which prohibits sending text messages to consumers without their written consent.
   - The phone number must be valid to initiate the opt-in.
3. Communicate
   - Send text messages!
   - Remember: Texting via Total Expert is a form of marketing communication, not a broadcast tool.
4. Automate
   - Turn on any texting journeys, if available.
5. Follow Up
   - Always respond to texts or find out the customer's preferred method of communication.

Expert Advice
   - Communicate with your customers about the setup process of getting them opted in to texts. They will get an automated message first—but it's really you!

Quick Facts

- A phone number through Twilio costs $1/month per number.
- Each text message costs $.01 to send and $.01 to receive.
- Total Expert deposits $2 into your account to begin.
- Costs are automatically billed monthly. Corporate billing is available.

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5 Marketing Strategies

1. Call to Action
   - Engage with recipients.
   - Let them know what to do or what to expect next.
   - Examples: "Check out the email I just sent you!" "Let me know when you receive the paperwork."
2. End with a Question
   - Promote engagement and prompt a response.
   - Examples: "Have you heard…?" "What questions do you have for me?" "How can I help you with this?"
3. Time of Day
   - Always send texts at the appropriate time of day and consider time zones.
   - Total Expert won't send automated texts at weird times of the day, either!
4. Provide Value
   - Text information that appeals to customers and encourages them to open the message.
   - Examples: Important notifications like loan updates (your customers can find out about their loan process before you do!), offers, new programs, or events.
   - The more you know about the customers, the more valuable you can make your message.
5. Use Emojis
   - It humanizes texts and automation, and helps customers know the message is coming from you.

Expert Advice
   - Create a saved list or group to organize and communicate with contacts based on their preferred communication method.
   - Don't use texting if the customer doesn't respond.