



# Batch/Bulk Texting Techniques and Best Practices

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## Introduction

This document describes the multiple methods of Batch Texting from 360 SMS, a.k.a. Bulk Texting and differentiating features of the platform as compared to other SMS apps. Additionally, there is a section on **best practices** for batch texting at the end of the document plus references to **Compliance Best Practices** and **Opt-Out** handling, which is fully described in the document: [Compliance Best Practices](#)

There are five methods of Batch Texting and Batch Ringless Voicemail. All methods support **Scheduling**, all methods support **Templates** or **iText** (ChatBot/Surveys). All methods support **custom objects**.

1. **List Views** – the **Send SMS** button is placed on List Views or Related Lists
2. **SMS from Reports** – this is a unique feature only available from 360 SMS whereby you use standard Salesforce Reports to execute the batch SMS. This is the most robust method as SF Reports allow cross object queries and literally millions of rows.
3. **Campaign** – Add the **Send SMS** button to the Campaign Page Layout and all Campaign Members can be sent a Template/iText of your choosing.
4. **SMS Grid** – aka Conversation Manager – The 360SMS Grid tool is available as an installable add-on that provides an Excel-like edit-in-place, sortable, groupable, filterable solution that allows up to 500 rows to be selected for a batch SMS job.
5. **3<sup>rd</sup> Party Grid apps** – 360SMS offers batch texting as a Custom Action from popular 3rd party Grid solutions such as [Conga Grid](#).

The three most powerful differentiating features of 360SMS's Batch features are:

1. **Dynamic Sender Numbers** - the use of a Salesforce formula field specifically named `Sticky_Sender__c` to define any business logic for the records SMS Sender Number. HUGELY important and differentiating. Example use cases:
  - a. Marketing sends batch SMS but wants it to come from the Salespersons known number, the Sticky Sender formula handles this automatically.
  - b. A company handles multiple geographical territories and wants the Sender Number to “stick” with each customer whether the initial sender number was chosen manually or computed geographically, e.g. Country = UK gets a UK sender number, NYC customer w/ a 212 area codes gets a 212 sender number, Colorado customers gets a 303.
  - c. Large Bulk SMS campaigns can split the traffic, to increase throughput and avoid frequency and content blocks enforced by phone providers when texting to rapidly on the same number. This is a cost-effective alternative to purchasing Short Codes.
  - d. Common formulas
    - i. Define the formula to pull from `Contact.Owner.SMS_Number`



- ii. Define the formula to match the customers area code so they get a recognizable local number, see this document: [Area Code Matching SMS Numbers](#)
  - iii. Define numbers by geography, product-lines, leads source, or anything else.
2. **Ringless Voicemail** – after batch texting your list, use the exact same interface to send a voicemail message to the same list or a smaller segment of those that replied – “*Bob here @ Acme Widgets, sorry I missed you. Just following up on the text I just sent you. Call me back at this number.*” You will be amazed at the call-backs and cost effectiveness versus hiring someone to cold call.
  3. **iText (Intelligent Texting)** – 360 SMS offers a point-and-click ChatBot/Survey tool providing an easy way to handle the inevitable success of your campaign. The tool can gather information and fire off the next responses all with an easy-to-use point-and-click interface.

Recruiting - Job Listing - Interest w/ Action Handling Survey List [Create New Survey](#)

Survey: Recruiting - Job Listing - Interest w/ Action ... Active Object: Job\_Listing\_Contact\_\_c

Brief Description: Job Listing Survey - Manually se... [Edit](#) [Clone](#) [Delete](#)

---

Question: Hello (!job\_listing\_contact\_\_c.contact\_\_r.firstname) - (!\$User.firstname) here @ (!\$Organization.name), here's a hot new job you might be interested in: Label: Job - Initial Interest?
+ Answer [✎](#) [🗑️](#) [📄](#)

(!job\_listing\_contact\_\_c.job\_listing\_\_r.name)  
 Location: (!job\_listing\_contact\_\_c.job\_listing\_\_r.location\_\_c)  
 Salary: (!job\_listing\_contact\_\_c.job\_listing\_\_r.pay\_\_c)  
 Web: (!job\_listing\_contact\_\_c.job\_listing\_\_r.web\_link\_\_c)

Interested? Reply YES, NO or MORE INFO

---

Answer: Yes || Y || Yes, thank you || Sure || Interested || Yes I'm interested || Yes, I'm interested || Yep|| Maybe || Send me more info || Yep || Si || Oui || absolutely! || definitely interested 🙌 || Ok || Okay || 🙌 || 🙌 || [✎](#) [🗑️](#)

---

Question: Great to hear (!job\_listing\_contact\_\_c.contact\_\_r.firstname). I'm glad you're interested in the (!job\_listing\_contact\_\_c.job\_listing\_\_r.name) position. Label: Working Currently?
+ Answer [✎](#) [🗑️](#) [📄](#)

Are your currently employed?

Reply YES or NO. 🗨️

Answer Paths fire the next question.

Easily update fields or take other actions

---

Answer: YES || Y || Yep || employed || 🙌 || at least for now || yes, but not for much longer [✎](#) [🗑️](#)

---

\*Answer: [✎](#) [🗑️](#)

---

Answer: No || N || Un-employed || unemployed || I'm unemployed 🔄 Start Date? ▾ [✎](#) [🗑️](#)

---

Answer: NO || Not Interested || I'm not interested || NOPE || Not Interested 🙄 || no 🙄 || 🙄 [✎](#) [🗑️](#)

---

\*Answer: Exception Answer [✎](#) [🗑️](#)

---

Answer: MORE INFO || INFO || APPLY [✎](#) [🗑️](#)



## Batch SMS Dialog Box explained

All methods of batch texting will ultimately pop up the same **Batch SMS** dialog box no matter the access point, so it is worth explaining here before documenting the various access points.

The screenshot shows the 'Create Message' dialog box with the following callouts:

- When the user has access to multiple Sender Number or if Sticky Sender is defined the number pick list appears.** (Points to the 'Record Owner #' dropdown menu)
- SMS or WhatsApp** (Points to the 'Channel' dropdown menu)
- The message starts from a Template or iText Survey but can be edited on the fly** (Points to the 'Template' dropdown menu)
- Choose a voice recording to send Ringless Voicemail** (Points to the voice recording icon)
- Add pictures** (Points to the 'Add Files' button)
- Schedule the messages for later delivery** (Points to the 'Schedule' checkbox)
- Relate Incoming to Record Owner** (Points to the 'Relate Incoming to Record Owner' checkbox)
- If the object configuration defines multiple phone fields the pick list appears** (Points to the 'Send To' dropdown menu)
- Pick a Template or iText (chatbot/survey)** (Points to the 'Template' dropdown menu)
- Instead of replies coming to the user pressing the button, replies come to the Record Owners** (Points to the 'Relate Incoming to Record Owner' checkbox)

Figure 1 - Batch SMS Dialog explained

**Relate Incoming Record Owner** – Commonly a marketer or SF Admin is executing a big batch and using the features of [Record based Sender Number \(Sticky Sender\)](#) to distribute the traffic and provide a consistent phone number for the customer. In this scenario it is **IMPORTANT** to remember the core principal of the 360SMS Platform: **The INCOMING reply INHERITS from the preceding OUTBOUND.** This includes the SMS\_History.Owner which of course controls who is notified of the reply.

360SMS has a unique feature “**Relate Incoming to Record Owner**” which when checked will automatically override this core principle so that instead of the replies coming to the user executing the



Batch SMS button, the replies will be assigned to the Contact.Owner or Lead.Owner.

**Batch Ringless Voicemail** – When choosing a voice recording to batch send, all records access the single voice recording. Note that there is a 5 to 10 minute delay in delivery as opposed to SMS which is instant. The number shown in the customer voicemail is the same Sender Number as what would be used for texting so that if they call back, it will call forward to your defined voice number.

**Batch Texting Pictures** – Note that when choosing one or more Pictures, only one copy of the file is stored in the Salesforce CONTENT DOCUMENT object and all the outbound messages reference it, so as to save on storage.

## List Views

[Figure 2](#) shows a typical List View (query) and the process of pressing the **Send SMS** button. List Views are fairly simplistic only allowing simple queries and 200 selectable rows, so this method is usually only for small lists or end-users that do not have access to the more sophisticated options of Reports or Campaigns.

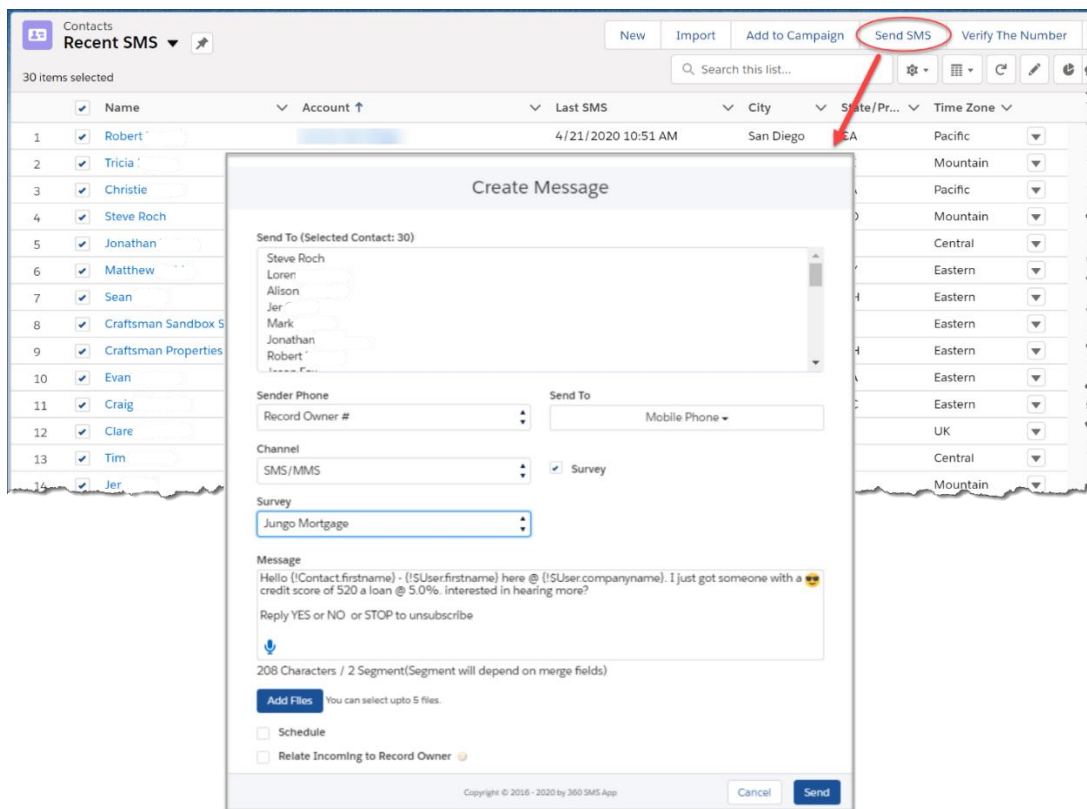


Figure 2 - Batch SMS from List View

To configure Batch SMS for a List View or Related List simply add the pre-configured **Send SMS** button to your standard Search Layouts and/or Related Lists.



## SMS from Salesforce Reports

360 SMS is unique among SMS apps with its ability to use native Salesforce Reports to execute Batch SMS. Many apps can send Batch SMS from Campaigns and from List Views, but List Views have two major limitations:

1. Limited to 200 rows of selectable data
2. No ability to do complex cross object queries such as “Contacts that Replied to my Last SMS” or “Contacts that did not reply to my Last SMS” – where the query invokes multiple “child” objects.

[Figure 3](#) and [Figure 4](#) on the following pages show the **SMS from Reports** interface. Note that because Salesforce does not allow customizations to their Reports Interface, we must make the user choose this “SMS from Reports” tab **first**. They then choose their report and then we offer our “SEND” button which then pops up as shown in [Figure 4](#).

### Key Points:

1. When using reports with multiple objects the primary object must be the object you’ll be texting from. Your report must expose its Record ID field as a column on your report, e.g. Contact ID
2. Supports Tabular Reports and Summary Reports
  - a. **Tabular Reports**
    - i. By default, the feature sends messages for the first 2,000 records then stops.
    - ii. Use the “**Enable Reports Running for more Records**” checkbox in the reports interface to go beyond 2,000 records.
    - iii. Obviously sending batches greater than 10,000 can take between 3 – 5 minutes, so be patient.
    - iv. To send batches > 2,000 your object must have an auto-number custom field and your report must be sorted by this field, so it knows how to process the messages in numeric order. See the next section **Big Batches** for a deeper dive into the necessary configurations for large batches.
    - v. Unless you are using a short code, make sure your object is using the [Record based Sender Number \(Sticky Sender\)](#) formula so that the traffic is being dispersed across multiple Sender Numbers. Additionally, make sure you have read the [Bulk SMS Best Practices](#) section below so that you avoid **Frequency** and **Content Blocks** inherent in batch texting.
  - b. **Summary Reports**
    - i. Summary reports can only send up to 2,000 records due to Salesforce limitations



SMS From Reports   Text   CTI Dialer

### My Reports

Search Report By Name, Id or Folder...

Report Name	Report Format	Folder Name
TX and FL customers	Tabular	Public Reports
API Call Last 24 hours	Tabular	Private Reports
Batch Leads - Tyger	Tabular	Private Reports

Showing 1 to 10 of 134 entries   Previous   Next

Selected Report: Batch Leads - Tyger (View Report)

Enable Report running for more records:

Send MMS:

Select Record Id Column:

- Company / Account
- First Name
- Last Name
- LeadID**
- Phone Number
- Mobile Number

Send

NOTE : 1. In Report, for sending SMS "Record Id" column is mandatory.  
2. By default from Reports, you can send SMS up to 2k records at once.  
3. You can send SMS more than 2k records only from Tabular reports by using certain filter criteria as mentioned in "360 SMS App Guide".

Figure 3 - SMS from Reports screen - pick your report first, define the Record ID column, Enable Report running for more Records

Send To (Selected Lead: 2670)

Sender Phone: Sticky Sender

Channel: SMS/MMS

Survey    Folder

Survey: New Lead - Loan Application

Message:

Hello {Lead.FirstName} - Thx for your interest in a Loan from Acme Loan Services.

We have a few questions to ask or if you prefer you can apply via our website but texting is faster. Web Application: <https://boldercrm.com/360SMS>

Reply TEXT or WEB

254 Characters / 2 Segment(Segment will depend on merge fields)

Add Files   You can select upto 5 files.

Schedule

Relate Incoming to Record Owner

Copyright © 2016 - 2020 by 360 SMS App   Cancel   Send

Figure 4 - After the Send SMS button is pressed, choose a template or iText Survey





## Big Batches

When running a report with more than 2,000 records you must use the “**Enable Report running for more records.**” When using this option your report must have a special custom field of type= AutoNumber named and specifically **Filter Number**. The report must be sorted by the Filter Number field in **ascending** order. This allows the proprietary feature to loop through the records correctly.

**This technique of sorting by the Filter Number is also recommended for all reports greater than 500 records** as the combination of the Filter\_Number sorting and the use of **Sticky Sender** can greatly help with the potential Frequency Blocks by randomizing your data. It is counter-intuitive but instead of creating separate reports for each sales person and using a single sender number, a larger report like shown below which will use Sticky Sender to send from each Lead.Owners number plus the use of “Related Incoming to Record Owner” will have the most success and save you time to boot!

Given that approximately 2 messages will be sent per second, the randomization creates an artificial pause as it hits each different Lead.Owners sender number. The anti-spam frequency block algorithms are looking for 100 messages on the same Sender Number in a 100 second period plus analyzing the content for perfect matches as well. Thus, in the example below, you are not only increasing the throughput with multiple numbers but also tricking the algorithms with a brief pause between numbers as it processes the next range of sender numbers.

Report: Leads Batch Leads							
Total Records		Total SMS Opt out					
1,112		0					
	Filter Number ↑	Sticky Sender	Lead Owner	Lead ID	SMS Opt out	First Name	Mobile
1	000811	17206050632	Steve Roch	00Qf400000G5qUx	<input type="checkbox"/>	Hamza	(301) 851
2	000812	14092026301	Yash Mallk	00Qf400000G5qUy	<input type="checkbox"/>	Arl	(202) 744
3	000813	14092026301	Yash Mallk	00Qf400000G5qUz	<input type="checkbox"/>	Farlda	(203) 564
4	000814	14092026301	Yash Mallk	00Qf400000G5qV0	<input type="checkbox"/>	Kashif	(914) 720
5	000815	17206050632	Steve Roch	00Qf400000G5qV1	<input type="checkbox"/>	Hera	(201) 469
6	000816	17206050632	Steve Roch	00Qf400000G5qV2	<input type="checkbox"/>	Chaudry	(201) 455
7	000817	14092026301	Yash Mallk	00Qf400000G5qV3	<input type="checkbox"/>	Yahya	(201) 914
8	000818	17206050632	Steve Roch	00Qf400000G5qV5	<input type="checkbox"/>	Adam	(202) 225
9	000819	14092026301	Yash Mallk	00Qf400000G5qV6	<input type="checkbox"/>	Shablir	(202) 341
10	000820	17206050632	Steve Roch	00Qf400000G5qV7	<input type="checkbox"/>	Silveth	(202) 361
11	000821	14092026301	Yash Mallk	00Qf400000G5qV8	<input type="checkbox"/>	Dana	(202) 362
12	000822	14092026301	Steve Roch	00Qf400000G5qV9	<input type="checkbox"/>	Wajld	(202) 413



**Step 2. Enter the details**

Field Label:  ⓘ

Display Format:  Example: A-{0000} [What is This?](#)

Starting Number:

Generate Auto Number for existing records

Field Name:  ⓘ

Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

**Must generate for existing records**

Figure 5 - A special AutoNumber field for the object must exist on the report and the report must be sorted in Ascending order by this field as the primary sort

REPORT ▾  
Batch 1 SMS Memorial Day ✎ Contacts & Customers

Previewing a limited number of records. Run the report to see everything.

Fields >	First Name ▾	Last Name ▾	Customer: Mobile Phone 1 ▾	Customer ID ▾	Filter Number ↑ ▾	Mobile Opt Out ▾
1				0010z00001Qt12H	110613	<input type="checkbox"/>
2				0010z00001Qt16E	110639	<input type="checkbox"/>
3				0010z00001Qt16T	110641	<input type="checkbox"/>
4				0010z00001Qt16Y	110642	<input type="checkbox"/>
5				0010z00001Qt16d	110643	<input type="checkbox"/>
6				0010z00001Qt16n	110644	<input type="checkbox"/>
7				0010z00001Qt16s	110645	<input type="checkbox"/>
8				0010z00001Qt16x	110646	<input type="checkbox"/>
9				0010z00001Qt177	110647	<input type="checkbox"/>
10				0010z00001Qt17H	110648	<input type="checkbox"/>
11				0010z00001Qt17R	110649	<input type="checkbox"/>
12				0010z00001Qt17W	110650	<input type="checkbox"/>

Filters:

- Add filter...
- Show Me: All customers
- Created Date: Jan 1, 2018 - May 31, 2019
- Customer: Mobile Phone 1 not equal to ""
- Mobile Opt Out equals False
- Filter Number greater than 0**

**Must be exactly this field name and this filter criteria**

**Must be sorted by the Filter Number field.**

Figure 6 - The report must filtered on the Filter\_Number field > 0 and Sorted by the Filter\_Number in Ascending Order

360SMS also has a feature called Co-Pilot which can completely randomize the Sender Numbers and greatly increase throughput and delivery. [Figure 6](#) shows an example report that returns 64,000 records. In this scenario we used the Co-Pilot feature to disperse the messages among 20 separate long codes so that on average if 2 messages are sent every 1 second dispersed between 20 numbers, we'll send at 144,000 per hour. Contact your sales rep for information on Co-Pilot.



## Campaigns

360 SMS provides a **Send SMS** button for the Campaign object to facilitate batch texting Contacts and Leads of the Campaign Members object. Campaigns are useful because “members” can be added from List Views or Reports in bulk and the Campaign supports up to 50,000 members.

As shown in [Figure 7](#), press the **Send SMS** button which prompts for the **Campaign Member Status**, then because campaigns can have a mixture of Contacts and Leads, it will prompt for Templates/Surveys based on each of those objects. The resulting outbound SMS appears under the Contact or Lead, respectively.

**IMPORTANT:** This method has the added benefit that the resulting Outbound SMS History and any replies will be automatically link to the Campaign, opening the door to automations such as setting the CampaignMember Status = Responded. You’ll still need process builder for that work, but the point is that you have the necessary “hook” that you need.



Campaign: 360SMS Leads - Demo Watchers

Type: Demo Signup / Trial | Status: Completed | Start Date: | End Date: | **Send SMS** | Delete

Details | Related | **Campaign Members**

↑ Status (5) ×

+	□	ACTION	STATUS	LEAD	CONTACT	COMMENT	CREATED DATE
▼	□	View Edit	Engaged		Tricia		3/21/2019 9:45 ...
▶	□	View Edit	Engaged		Adam		3/21/2019 9:45 ...
▶	□	View Edit	Engaged				
▶	□	View Edit	Engaged				
▶	□	View Edit	Engaged	Andrea			
▶	□	View Edit	Engaged	Dan			
▶	□	View Edit	Engaged				
▶	□	View Edit	Engaged				

### Create Message

Sender Number: Sticky Sender

**Campaign Member Status: --None--**

Channel: SMS/MMS

**Contacts(105)**

Send To: Mobile Phone

Template: Contact - Happy New Year

Message: Hey {!Contact.firstname} - {!User.firstname} here @ BolderCRM/360SMS. Wishing you a very Happy and Prosperous New Year!!  
123 Characters / 1 Segment(Segment will depend on merge fields)

**Leads(240)**

Template: Lead - Happy New Year

Message: Hey {!Lead.firstname} - {!User.firstname} here @ BolderCRM/360SMS. Wishing you a Happy and Prosperous New Year!!  
115 Characters / 1 Segment(Segment will depend on merge fields)

**Add Files** You can select upto 5 files.

Schedule  Relate Incoming to Record Owner

Copyright © 2016 - 2020 by 360 SMS App | Cancel | **Send**

Figure 7 - Batch SMS from Campaigns - choose separate templates for Contacts vs. Leads



## 360 SMS Grid – Conversation Manager

The 360 SMS Grid is an optionally installed module allowing a robust Excel-like experience to help with the management of any list data but it was primarily designed to help manage multiple SMS conversations at once with its Outlook style Reading Pane to quickly navigate through many conversations and make quick updates to the underlying record using a fully editable page layout in the DETAIL tab of the reading pane.

In the context of Batch Texting, the grid has an **Actions** menu that allows various actions on multi-selected rows such as **Send SMS** for up to 500 selected records. The same batch SMS window pops up when selected.

The grid supports both standard and custom objects, and offers in-line editing, Grouping, multi-column sorting, Excel-style filters and we will be adding more batch actions as the product evolves.

The screenshot displays the 360 SMS Grid interface. On the left, a table lists job candidates with columns for Action, Contact, Status, and Start Date. The 'Actions' menu is open, highlighting 'Send SMS'. A red callout bubble points to this menu with the text: "Batch SMS 500 selected rows Mass Update coming soon". The row for 'Peyton Manning' is selected and highlighted in blue. A red arrow points from this row to the right-hand pane, which shows an SMS conversation detail. A red callout bubble points to the 'Send SMS' option in the Actions menu with the text: "The SMS Grid offers powerful Excel-like features plus contextual reading pane for quick access to the SMS Conversation and Fully Editable Page layout of the selected row, without ever leaving the grid." The right-hand pane shows an SMS conversation with a message from Steve Roch to Peyton Manning about a job opportunity. The interface includes a search bar at the top, a navigation bar with 'Job Candidates - SMS Grid' selected, and a footer with pagination information.

Figure 8 - SMS Grid/Conversation Manager



## Batch Texting from 3rd Party Grid Solutions

The 360 SMS Batch Texting features can also be accessed from 3<sup>rd</sup> party Salesforce AppExchange products such as the popular [Conga Grid](#) product, through its “custom action” functionality. If you own this product, just request the Batch 360SMS custom action from your 360SMS Salesperson.

The exact same Batch SMS interface pops up when choosing the Batch 360SMS custom action from a Conga Grid. Note that the Conga Grid product also easily accesses the 360SMS conversation view contextually for the selected row. 3<sup>rd</sup> party grid products like this Conga Grid obviously offer a very rich Excel-like experience with many more features than the SMS Grid mentioned above.

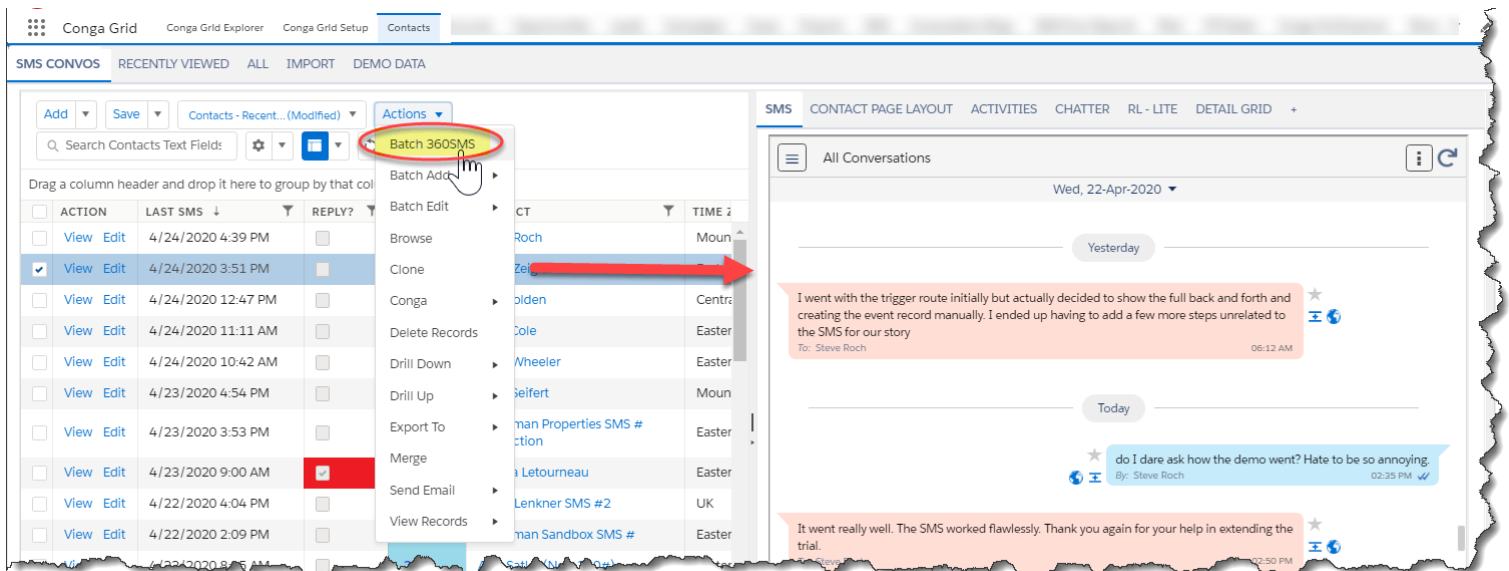


Figure 9 - 3rd party grid apps like Conga Grid can also access the Batch SMS feature of 360SMS



## Record based Sender Number (Sticky Sender)

360 SMS allows one to create a custom field named specifically **Sticky\_Sender\_\_c** (you can label it any way you like). This is a custom formula field that can hold any business logic that one wants, such as Geography-Based numbers, Area Code matching numbers, Marketing Campaign Based Numbers, Record.Owner based numbers or it could be defined as the Last SMS number used for the contact. The point is that any business logic can be defined.

Read the document [Area Code Matching SMS Numbers](#) for a specific detailed example.

If the Sticky\_Sender field exists, all interface elements of the platform (Buttons and Conversation View) will override the current users Default SMS Number and instead offer this field value as the default. For example, a marketing user may want to select a large list of contacts for Batch SMS but want the Sender Number to pull from the sticky sender. This also helps distribute batch SMS among multiple numbers thereby reducing potential Frequency Blocks imposed by downstream providers.

The screenshot shows the 'Create Message' interface. At the top, it says 'Send To (Selected Contact: 30)' followed by a list of names: Stev, Loren, Alisor, Jer, Mark, Jonathan, Robert, and Lisa. Below this is the 'Sender Phone' dropdown menu, which is currently set to 'Record Owner #'. A red speech bubble points to this field with the text 'The sticky\_sender field relabeld as "Record Owner #"'. To the right of the 'Sender Phone' field is the 'Send To' dropdown menu, set to 'Mobile Phone'. Below these are the 'Channel' dropdown menu (set to 'SMS/MMS') and a checked checkbox for 'Survey'. Under the 'Survey' section, there is a dropdown menu set to 'Jungo Mortgage'. The 'Message' field contains the text: 'Hello {!Contact.firstname} - {!User.firstname} here @ {!User.companyname}. I just got someone with a credit score of 520 a loan @ 5.0%. interested in hearing more?'. Below the message field, it says 'Reply YES or NO or STOP to unsubscribe'. At the bottom of the form, there is a '208 Characters / 2 Segment(Segment will depend on merge fields)' indicator, an 'Add Files' button, and two checkboxes: 'Schedule' and 'Relate Incoming to Record Owner'. The footer of the form includes the copyright notice 'Copyright © 2016 - 2020 by 360 SMS App' and 'Cancel' and 'Send' buttons.



## Sending Hyperlinks in Batch SMS

360 SMS uses **optional** automatic Bitly link shortening to shorten outbound hyperlinks. Not only does this facilitate click-tracking which updates in Salesforce dynamically but it greatly helps with batch texting as a unique link is generated for each outbound record thereby tricking the anti-spam algorithms that look for the same message coming from one number at to rapid of a rate.

Normally, customers use a free Bitly account. However, Bitly institutes per-month, per-hour, per-minute, per-user, and per-IP rate limits for each API method which should be taken into consideration if using a free Bitly account, in which case you just upgrade to their paid version:

[https://dev.bitly.com/rate\\_limiting.html](https://dev.bitly.com/rate_limiting.html).

Alternatively, 360 SMS offers the Tiny URL integration which is also free. Refer to the SMS Setup → General Settings. Read more @ [Hyperlink Clickthrough Tracking Configuration](#)

## Bulk SMS Best Practices

The following best practices will increase the likelihood that your message is **delivered, read and acted** upon. Just like email marketing these general “golden rules” apply to text-message marketing:

1. Personalize it
2. Identify who you are
3. Keep it short
4. Keep it relevant
5. Have a clear call-to-action

The first thing to think about with any text messaging campaign is the overall content and the actual message. Please consider these best practices and recommendations:

- **Always use their name** — Just like email marketing, personalization and relevance matter!
- **Use Merge Tags** — The sure-fire way to be identified as a spammer is to not personalize the message. At a minimum you should always use the `{!Contact.firstname}` merge tag but as noted in the “long messages” recommendation below, you should consider using merge tags in each 160 character segment especially for big batch/bulk SMS where the risk of the Frequency + Content blocking is ever-present.
- **Introduce yourself** — Do not assume your contact knows who you are, even if you have sent them previous messages. Usually, they have not saved you as a Contact on their phone and they have probably deleted your past messages. Remind them who you are EVERYTIME. e.g. *Hey Joe - Steve here @ Bolder CRM/360SMS*
  - **UserName Merge tags** — use either the `{!$User.firstname}` (current user) or `{!Contact.Owner.firstname}` merge tags so your templates are generic.
  - Hi `{!Contact.firstname}` - `{!$User.firstname}` here @ 360SMS.





- Hi {!Contact.firstname} - {!Contact.owner.firstname} here @ 360SMS.
- **Get to the point** – State why you are contacting them - remember it’s called “**Short Message Service**” for a reason. Nobody appreciates a super long text message.
- **Get to your Call-to-Action quickly** – The best messages are under 160 characters, so get to the point with your Call-to-Action as quickly as possible.
- **Give clear instructions** – Be sure that any instructions for replying or other actions are simple and clear, e.g. Reply YES or NO, Reply INTERESTED or NO, Reply 1, 2 or 3
  - **Upper Case your keywords** – Many modern SmartPhones offer intelligent auto responses as buttons. These are features of the phone, you’re just facilitating this functionality with clear uppercased keyword response options that the phones recognize OK and OKAY for instance will offer the 👍 emoji on iPhone X and above.
- **Don’t be passive** - Avoid open-ended questions, like “Let me know when you’re available.” Instead, **drive the action** with “I’ll be calling you in the next 5 minutes, reply OK or LATER.” Most people will reply LATER but then you automate the response with the 360 SMS iText tool. You’ll be amazed at how often people reply. The key is that you are engaging them long enough to then come in after the chatbot and have a real conversation. Sample replies to the LATER response:
  - “Okay, here’s a link to my calendar: <https://boldercrm.com/book-a-meeting/?v=Phone-Call>”
  - “No problem, reply with a date/time that’s convenient for me to call.”
- **Don’t obsess over length** – Choose clarity over obsessing about keeping the message short. At less than 2 cents per message segment (160 characters), choose a clear message rather than obsessing over keeping the message short. **Ultimately you want your message to be understood.**
  - No one wants your robot looking message. Here’s a classic for the texting wall-of-shame:  
**TextSTOPopout** - did they really need to save those two space characters and the word “to”?
- **Use Line Breaks** – It is okay and most definitely adds clarity to define your templates with line breaks just like you would use paragraphs. **Choose clarity every time!**
- **Use Hyperlinks** – Remember that hyperlinks sent in an outbound message are automatically shortened to unique trackable links with 360 SMS in a native Salesforce object. **Most importantly,** the link is Bitly shortened into a **UNIQUE** link for each contact, thereby tricking the content blocking algorithms into thinking that the content is different for each message. **This is a huge benefit over all other SMS platforms!** Even when Bitly is disabled the links are still unique per record.
  - When clicked, you will be notified via email (if enabled) and/or you can use process builders to capture the change in the Click Count field to:
    - Drive additional responses



- Add contacts/leads to campaigns
  - Update fields – increase a lead score or change a status
  - Create follow-up calls/tasks
  - Alert additional key stakeholders via SF push notifications, email alerts or SMS alerts
- **Long Messages** – Understand that the definition of the Global SMS standard splits all messages into 160-character chunks (90 characters when using emojis and other non-English characters). Thus, when sending longer messages in big batches, the carriers can flag the latter portions of your message as all being the same. While not always practical, try to work in some other merge tag into each 160-character segment of your message. Adding a hyperlink to the bottom of your message will often do the trick since it is automatically shortened to a unique link for each contact.
  - **Keep it light** – Texting is inherently more casual than email. People will appreciate you being less formal. No *“Dear Joe, I am writing because I am an old fuddy duddy that doesn’t understand texting.”* Instead try: *“Hi Joe – Bob here @ Acme Widgets, following up on your interest...”*
  - **Emoji’s are cool and fun** – In the vein of keeping it light, **DO** use emoji’s and even pictures. You’ll put a smile on someone’s face! Note, that emoji’s and pictures do increase your segment usage but **ALWAYS** choose impact over the relatively insignificant cost of the message.
  - **Watch acronyms, abbreviations and slang** – Not everyone understands texting acronyms. Gauge your texting terms and slang based on your audience.
  - **Anticipate a response** - Texting works! In fact, you can expect upwards of 40% response to many texting campaigns. Consequently, consider using the **360 SMS iText** tool every time instead of templates so that at least the initial response can be handled with automated responses.
    - Even if your message has no call-to-action you should still plan for responses.
    - Using the iText Default Answer path gives you a free “report” of the various ways people respond to your message by just going to the Question page layout and reviewing the Survey Response related list.
    - Designate the users that will handle the responses or warn your users if the responses will be using their numbers and owner Ids.
  - **Standard Carrier Charges Apply** – Seriously? Do people still need to be told that “std carrier charges apply” – we don’t think so. Maybe do this for your first message and then drop it but in 2020 we think everyone knows that when they text from their phone, they are the payer.
  - **Opt Out** – If it’s your first time texting this customer **do** give them a way to opt-out, “Reply STOP to opt-out.” We do not feel that it is necessary to add this language to every message. Most customers now understand that they can reply STOP to any message regardless of whether it has the language or not. 360 SMS **always** honors the **STOP** keyword and a defineable list of other words and phrases regardless of whether you say it in your outbound message, e.g. “remove me from your list”



## Compliance and Opt-Outs

The full Compliance document discusses important topics such as Opt-Out handling, Long Codes versus Short Codes, and other important SMS Marketing concepts regardless of your SMS Application. Please download the full Compliance Best Practices document at:

<https://boldercrm.com/download.php?f=360-SMS-Compliance-Best-Practices.pdf>

Rest assured though that regardless of the method used for bulk SMS, any customers that have previously **opted-out** will be skipped automatically as the process loops through the records.

## About the Author

Steve Roch, CEO of Bolder CRM is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange and also having built the popular Salesforce app [ActionGrid™](#), acquired by Conga in April-2016. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

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