SMS Enablement Strategy and Best Practices

Table of Contents

Overview

SMS is a powerful tool for real-time, high-engagement communication. To maximize its impact within Total Expert, this document outlines best practices, enablement strategies, and implementation guidelines for administrators and end users (loan officers and marketers).

Admin Enablement and System Setup

Incorporate SMS into Automated Journeys

To maintain consistency and maximize impact, build SMS into automated journeys. This ensures your communication strategy includes timely, high-engagement messages.

Recommended journey types (in priority order):

- In-Process Journey – The best starting point
- Lead Nurture / Pre-Approval
- Customer Intelligence Journeys (if available)
- Lifetime Journeys

Manual and Bulk SMS

Enable LOs to reach out with key updates and insights by uploading them as contacts using the data importer and assigning them to a designated group. This group can then be used for sending manual SMS messages.

Examples include:

- Company updates
- Training links
- Key reminders and alerts

> **Note**
> You can opt your LOs in by default, so no opt-in text is required. When you do your import of LOs, include the following mapped fields:
>
> `sms.opt_status` = `OPTED_IN`
>
> `SMS Target` = `Contact Phone Cell Number`

Managing SMS Consent (Opt-Ins)

Total Expert supports multiple methods for gathering SMS consent:

- **Preferred** – Gather consent when a contact fills out an application or online webform. Our API can be leveraged to opt in SMS numbers.
- **Flat File** – Ingest opt-in status via a flat file when needed.
- **Alternate** – TE's opt-in SMS works fine if automated collection is not available.

End User Enablement

Leverage the Mobile App Engagement Journey

This is an engagement journey designed to onboard, educate, and empower loan officers to fully adopt and leverage the Total Expert mobile app through a series of timely, bite-sized text messages.

Mobile App Enablement Journey (overview document)

> **Note**
> Contact your Customer Success Manager if the journey is not visible in your account.

Training Resources

Share training resources from the Total Expert knowledge base to help users learn how to use the features. Here are a few links to consider:

- *Feature Spotlight: Engage SMS* (live training)
- *Total Expert Mobile App and Engage SMS* (interactive training course)

Kickoff Training Events

- **Facilitate easy app access** – Display a QR code on-screen during webinars for both Apple and Android downloads to streamline installation.

- **Guide initial configuration** – Walk through login setup, including enabling biometrics and push notifications to make access seamless. If your organization uses SSO, ensure LOs have the SSO app downloaded for smoother login.

- **Optimize for ongoing use** – Instruct LOs to enable automatic app updates so they always have the latest features without manual intervention.

- **Demonstrate SMS automation** – Have each LO add themselves as a contact in the mobile app (not the platform), assign that contact to a test group, and trigger a notification. This allows them to experience firsthand how quickly a contact can be created and automated.

> **Note**
> For customers migrating from another platform like Surefire, Engage SMS is fully compliant with 10DLC requirements. Customers should be aware of what the user experience difference will be and prepare messaging prior to end user training and enablement.

Ongoing Support & Optimization

- Reinforce SMS usage during follow-up calls or training touchpoints.
- Emphasize response management: It is critical to respond promptly to incoming messages.
- Partner with your Customer Success Manager to:
    - Track SMS opt-outs and unsubscribes early.
    - Correlate SMS send frequency with opt-out rates.
    - Adjust timing and content strategy based on insights.
    - Monitor usage to identify inactive users (receiving but not replying).

Final Notes

Success with SMS comes from a blend of automation, personalization, and timely responses. By implementing these best practices and enablement strategies, your organization will drive higher engagement, faster communication, and stronger relationships through SMS.

For further assistance, reach out to your Customer Success Manager.