



SMS Automation Use Case Kit

Your Complete Toolkit for SMS Engagement, Automation, and CRM Integration

What's Inside the Kit

5 Ready-to-Use SMS Automation Templates:

- Welcome Message Flow
- Appointment Reminders
- Abandoned Cart Recovery
- Feedback Requests
- Flash Sale Alerts

Opt-in Compliance Flowchart:

- Visual step-by-step guide for GDPR-compliant SMS opt-in workflows

CRM Integration Checklist:

- All the components required to integrate SMS with your CRM systems like HubSpot, Zoho, or custom CRMs

SMS Automation Template

SMS Automation Template: Welcome Message Flow

Use this template to automate and streamline your SMS communication process.

Hi {FirstName}, welcome to [Your Business Name]! We're glad to have you.
Here's what you can expect next...

- ✓ Trigger: New sign-up or form submission
- ✓ Delay: Immediate or within 5 mins
- ✓ Follow-up: Include a CTA or helpful link

SMS Automation Template: Appointment Reminders

Use this template to automate and streamline your SMS communication process.

Hi {FirstName}, this is a reminder for your appointment with [Business Name] on {Date} at {Time}. Reply YES to confirm.

✓ Trigger: 24–48 hours before scheduled time

✓ Option to reschedule or cancel

SMS Automation Template: Abandoned Cart Recovery

Use this template to automate and streamline your SMS communication process.

Hey {FirstName}, you left something in your cart! Complete your order now and get 10% off with code SAVE10.

✓ Trigger: 30 mins to 2 hours after cart abandonment

✓ Include product link and incentive

SMS Automation Template: Feedback Requests

Use this template to automate and streamline your SMS communication process.


Hi {FirstName}, we'd love your feedback! How was your experience with [Product/Service]? Reply 1–5 or leave a short review.

✓ Trigger: 1–2 days after service completion or delivery

✓ Link to feedback form (optional)

SMS Automation Template: Flash Sale Alerts

Use this template to automate and streamline your SMS communication process.

 FLASH SALE! 24 hours only — get up to 30% off selected items. Shop now at [your-link].

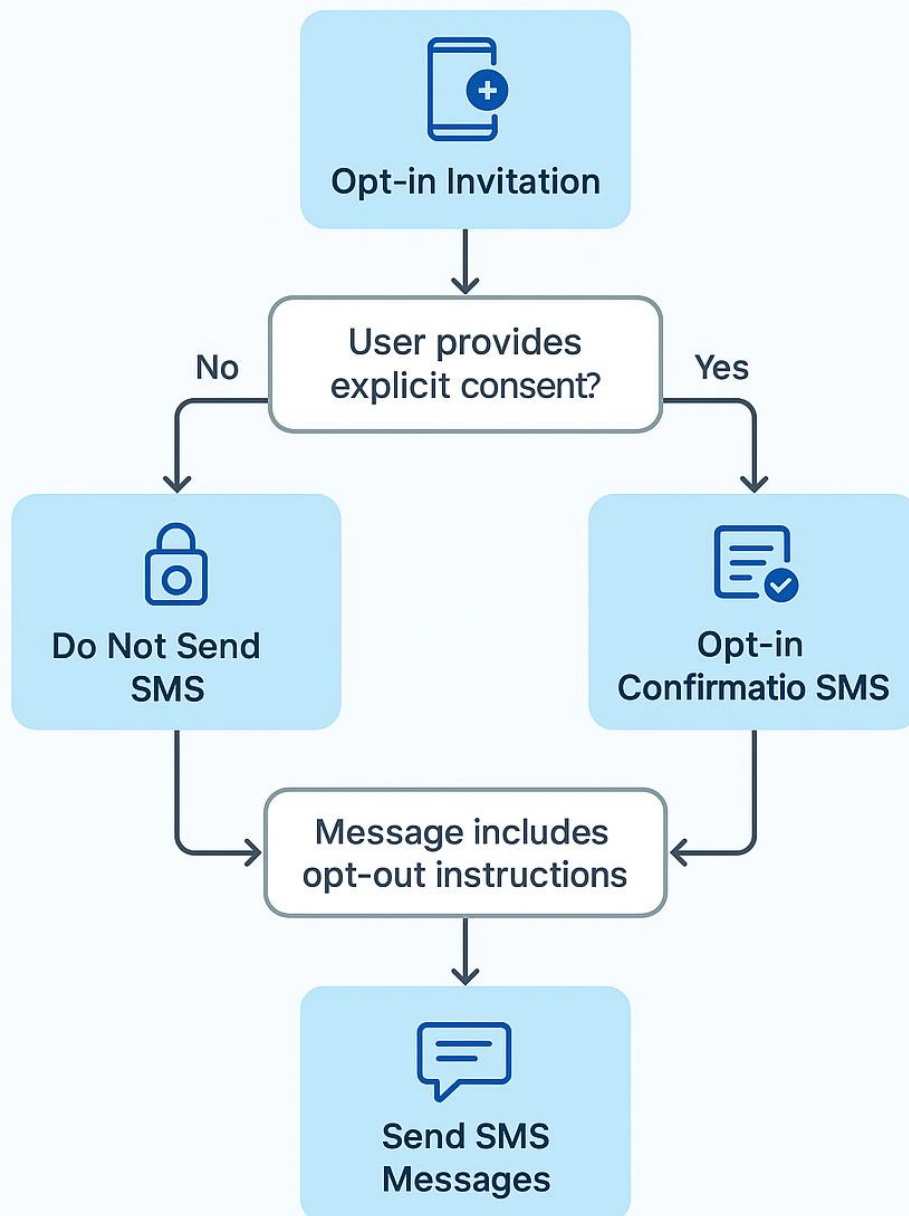
✓ Trigger: Manually scheduled

✓ Include shortlink and urgency

Opt-in Compliance Flowchart

Opt-in Compliance Flowchart

Visual step-by-step guide for GDPR-compliant
SMS opt-in workflows



CRM Integration Checklist for SMS Automation

Ensure a seamless and compliant integration between your CRM and SMS platform.

Key CRM Integration Requirements

- ☒ API Access or Webhooks Enabled in Your CRM (e.g., HubSpot, Zoho, Salesforce)
- ☒ Contact List Segmentation for SMS Campaign Targeting
- ☒ Opt-In Consent Status Field Available in Contact Records
- ☒ Custom Field Mapping Between CRM and SMS Platform
- ☒ Automation Rules/Workflows for SMS Triggering Events
- ☒ Message History Log Synced with Contact Records
- ☒ Unsubscribe/Opt-Out Sync Enabled for Compliance
- ☒ GDPR or TCPA Consent Audit Trail Availability
- ☒ SMS Templates Stored Within CRM or Linked App
- ☒ Staff Trained on Sending Limits, Compliance & Workflow Setup

Expert Tips for High-Performance SMS Campaigns

- ☐ Keep messages under 160 characters for clarity and compliance.
- ☐ Use personalization tags like {FirstName} for better engagement.
- ☐ Include clear opt-out instructions to stay compliant and reduce unsubscribes.
- ☐ A/B test your SMS copy for better performance over time
- ☐ Schedule messages based on time zones and engagement patterns

Want Hands-On Help?

Book a free 15-minute strategy call with BhavPro and get personalized advice on launching your SMS automation journey.

Why Choose BhavPro?

- ❑ **15+ years** of experience blending tech with creativity
- ❑ **Fully remote**, fast delivery, collaborative revisions
- ❑ End-to-end from concept to publishing

Packages & Custom Quotes

We understand every creative need is unique. Instead of fixed pricing, we offer custom quotes based on your scope and goals. Book a free consultation and let's build your vision.

Powered by Bhav – AI, CRM, Telecom & Digital Innovation Specialist

✉ hello@bhavpro.com

🌐 www.bhavpro.com

📅 Book a Free Strategy Call: www.bhavpro.com/free-strategy-consultation



www.bhavpro.com
contact@bhavpro.com



+44-7448135897
+44-7404320833



Leicester
United Kingdom



BHAV - YOUR EXPERT IN AI, CRM, TELECOM & DIGITAL SOLUTIONS SPECIALIST

