FLOWIUM

SMS Marketing Unlocked: Strategy Checklist

SMS Opt-ins

- ☐ Multi-step forms
- ☐ Mobile and Desktop versions
- ☐ Offer a percent discount
- ☐ Opt-in at checkout
- ☐ Alternative ways to opt-in to grow SMS list (invitational email campaign targeting email-only subscribers, SMS sign-up invite in transactional emails, offering an invite for early access in product launch teaser campaigns)
- ☐ Driving SMS opt-ins by offering a sense of exclusivity to SMS subscribers (VIP treatment w/o VIP spending)
- ☐ Using Klaviyo tools for compliant list growth (explicit consent, follow regional compliance regulations)

SMS Flows

- ☐ Dedicated SMS Welcome Series
- ☐ Abandoned Cart SMS
- ☐ Browse Abandonment SMS
- ☐ Customer Winback or Inventory Alerts
- ☐ Minimum of 3 flows with SMS (i.e. SMS Welcome Series, Abandoned Cart, Customer Winback or Inventory Alerts etc.)
- ☐ Virtual Contact Card to the **first** message received by customer in welcome series (Only applicable to US & Canada)
- ☐ Product images dynamically added to abandonment reminders
  Product images dynamically added to inventory alerts

SMS Campaigns

- ☐ Sale Announcements
- ☐ Holiday Promotions
- ☐ New Product Announcements
- ☐ VIP / Early Access
- ☐ Last call before sale ends (excluding those who have purchased - email as the primary channel for highly anticipated sales, while using SMS as a last call to grab subscribers' attention)
- ☐ Reward SMS subscribers (exclusive deals, early access, insider tips, ask for feedback and other benefits to build exclusivity around the channel)
- ☐ SMS campaigns are NOT a duplicate of email campaigns

BFCM

- ☐ BFCM SMS Campaigns
- ☐ Use SMS over MMS
- ☐ Clearly communicated holiday offer and timeline
- ☐ Creation of holiday templates

SMS Campaign Frequency

- ☐ 2 major announcements for promotions, new releases, or holidays to your full list (excluding profiles who have already converted)
- ☐ 2 follow up campaigns to the major announcements either for early access or last call before sale ends (excluding profiles who have already converted)
- ☐ 3 targeted campaigns to segmented audiences
  - ☐ **[CATEGORY or PRODUCT] Purchasers or Viewers:** announcements for price drops or recommend similar products
  - ☐ **VIPs:** send exclusive content like blogs or podcasts, offer sneak peeks, or reminders for reward points
  - ☐ **New Subscribers, Non-Purchasers:** offer assistance or send a reminder for first purchase discounts

SMS Campaign Frequency (UK & Australia)

- ☐ 4 SMS campaigns per month
  - ☐ 1 major announcements for promotions, new releases, or holidays to your full list excluding profiles who have already converted
  - ☐ 1 follow up campaigns to the major announcements either for early access or last call before sale ends
- ☐ 2 targeted campaigns to segmented audiences
  - ☐ **[CATEGORY or PRODUCT] Purchasers or Viewers:** announcements for price drops or recommend similar products
  - ☐ **VIPs:** send exclusive content like blogs or podcasts, offer sneak peeks, or reminders for reward points
  - ☐ **New Subscribers, Non-Purchasers:** offer assistance or send a reminder for first purchase discounts

(SMS in AUS and UK is higher due to pricier carrier fees, we recommend sending fewer campaigns than in the US)

When To Use SMS

- ☐ Send information
- ☐ Make general announcements (Sales, early access, order confirmation)
- ☐ Linking to new content (Blogs, tips or any value added content)

When to use MMS

- ☐ New Product announcements
- ☐ Back in stock
- ☐ Price Drop alerts
- ☐ Abandoned cart
- ☐ Browse Abandonment
- ☐ Personality messages with GIFs or inspirational images

Segmentation

- ☐ Basic SMS Engaged Segment
- ☐ Advanced SMS Segmentation
  - ☐ SMS Engaged Segment Tracks
  - ☐ Prefers SMS Segment
  - ☐ SMS VIP Segment
  - ☐ SMS Location-based segment (only applying to B&M or shipping zones)
  - ☐ SMS subscriber by country (shipping zones)
  - ☐ SMS Budget Shoppers
  - ☐ SMS marketing Preferences
  - ☐ Received Virtual Contact Cards (Only US and Canada - Not applicable to UK, Australia, or New Zealand)

Exclusions

- ☐ Subscribers who have converted are excluded from SMS

Short Codes

- ☐ Using shortcodes (if surpassing 10,000 in deliverability)

SMS Tone

- ☐ Messages sound conversational/human-like and on-brand
- ☐ Messages are personalized based on customer interests, discounts based on past purchases, and messages about products and services they are interested in
- ☐ Offering dedicated customer support via text (Two-way texting as a competitive advantage)

Compliance

- ☐ SMS quiet hours
- ☐ Company name
- ☐ Opt-out language

Optimization

- ☐ A/B testing forms
- ☐ A/B Testing SMS content
- ☐ Split testing email vs. SMS
- ☐ Benchmarking SMS performance