



MEERA.ai

# AI Texting 101

How to build a text messaging system that automates your sales outreach



Hey Kathy, your requested quote for an auto insurance is ready. Do you have a few mins to chat?

Not at the moment, maybe tomorrow.

# Intro: **The rise of AI-powered** sales outreach and automation

It's safe to say AI isn't going anywhere. Businesses in virtually every industry are already looking at new ways to integrate AI into their core processes.

A PricewaterhouseCoopers survey revealed 54% of businesses have already implemented some form of generative AI (GenAI) into their businesses. Meanwhile, over 90% of businesses are already using AI-driven personalization to accelerate growth and 86% of US executives see AI as a "mainstream technology."

And it's not hard to see why, either. A recent Forbes survey revealed:

- ✓ **60% of business owners believe AI will improve customer relationships**
- ✓ **60% of business owners believe AI will boost productivity**
- ✓ **65% of consumers say they will continue to trust businesses using AI**

What's clear: AI is here to stay and any business looking to stay competitive will need to figure out the best way to implement it if they want to avoid being left behind by early adopters in their industry.

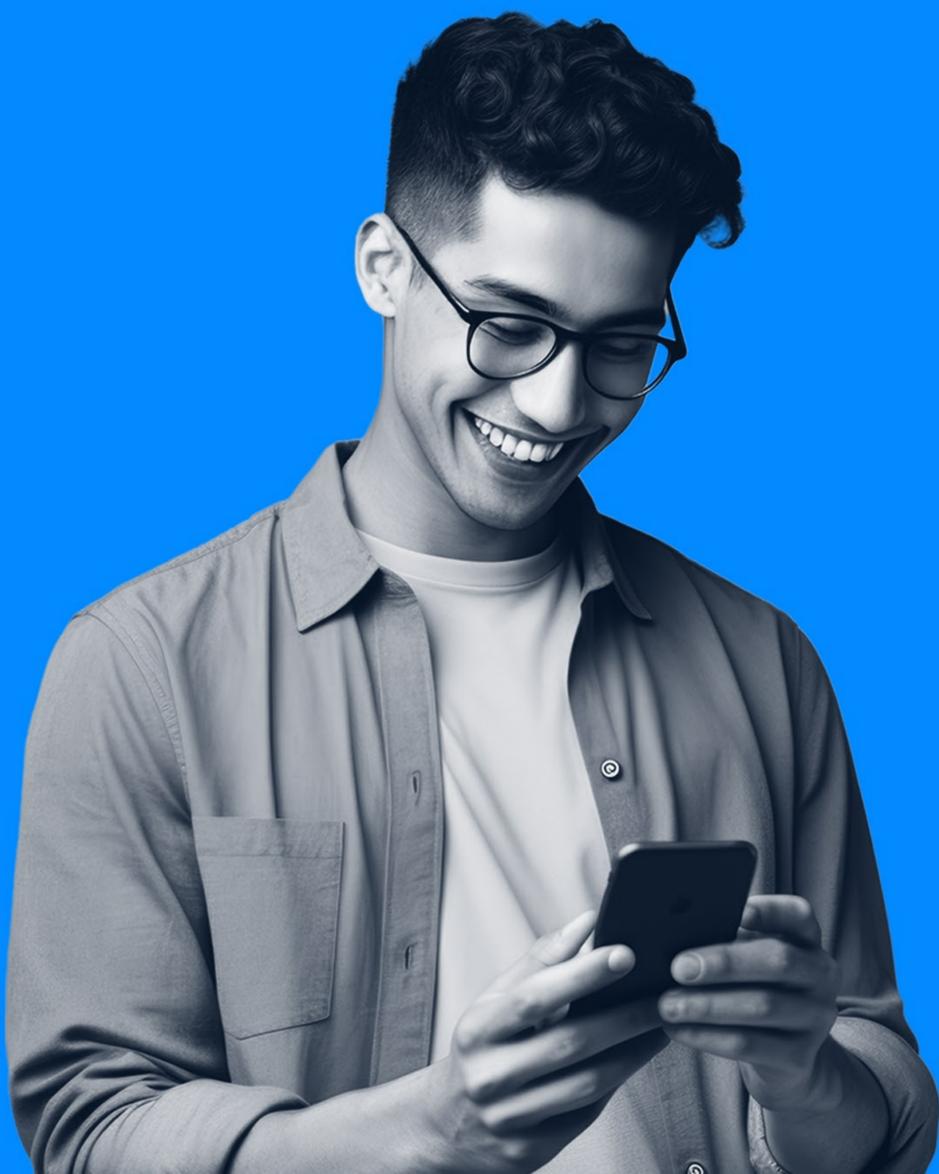
You may be thinking – what's the best place to start your AI journey? Historically, for many companies exploring early process automation, the finance department was the logical choice. **But thanks to the rise of conversational AI and GenAI – more and more companies are turning to sales automation through AI texting.**

Not sure where to start? Don't worry, we'll cover the basics of AI texting, how effective it is, what it looks like in practice, and provide a step-by-step guide to getting your first AI texting campaign off the ground.

## AI texting: **Quick Stats**

### You Need To Know

- ✓ Consumers **open 98%** of text messages received
- ✓ **80% of customers report having a good experience** solving a problem with conversational AI
- ✓ Companies using conversational AI **increased sales by 67% on average**
- ✓ 90% of companies using conversational AI **save up to 4 minutes per question**
- ✓ Conversational AI **can lower the cost of an interaction to \$0.70**



# How to create your **first** AI texting campaign

Next, let's break down the steps you need to take to get your first AI texting campaign off the ground.

## Step 1: Brainstorm your next campaign

The first step is to think about how you want to use AI texting to support sales and marketing. **You can use these questions to help you narrow down on where to start**

- ✓ What KPIs are you trying to improve?
- ✓ What part of the sales process is slowing your sales teams down?
- ✓ Are you looking to market to new or existing leads?
- ✓ Do you have any specific workflows or processes that will need to be integrated with your AI texting platform?
- ✓ Do you have the internal resources needed to support an AI texting campaign?

The goal of any AI texting campaign is to reduce the amount of strain on your sales and marketing teams. For many companies, this means offloading sales outreach to a conversational AI so humans can be looped back in at the perfect time.

For example, you may use conversational AI to immediately contact new opt-in leads, increasing your speed-to-lead while ensuring high-intent leads are warmed up while they're most interested in your products and services.

Still not sure where to start? **Meera customers automatically get paired with an AI expert who can help you find the best starting point for your first AI texting campaign.**



## Step 2: Register your brand with the major carriers

AI texting, like most forms of sales outreach, is heavily regulated by the Federal Communications Commission (FCC), Federal Trade Commission (FTC), and the Telephone Consumer Protection Act (TCPA).

The high cost of individual violations, constantly changing rules and regulations, and the complexities of getting your brand registered with the major carriers can be challenging to overcome for the inexperienced.

Getting your brand registered will require knowing things like:

- ✓ Your specific use case and any special TCPA Requirements it may have
- ✓ The volume of texts for your campaign

- ✓ Which mobile carriers you will use
- ✓ Where to obtain localized numbers
- ✓ The technical steps in this process
- ✓ What resources you have available internally and What needs to be outsourced

Unfortunately, this step is often a roadblock for companies. The smallest mistakes can lead to rejection. **Meera handles this process for our customers, expediting the approval process and launch of your campaigns.**



### Step 3: Create the **conversational AI** scripts

After registration comes the fun part: creating the scripts for your AI texting campaign. This will require a thorough understanding of your business, its customers, and the goals of your AI texting campaign.

**Some of the most important steps of this process include:**

- ✓ Looking at past voice of the customer data like sales calls and other touchpoints to map out frequently asked questions for your conversational AI to answer
- ✓ Reviewing your website to identify additional insights that may be useful to train the conversational AI with
- ✓ Collecting lots of use cases and personalizing them to support your AI
- ✓ Ensuring the conversational AI uses a human-like tone that resonates with your customers

- ✓ Understanding what to say, when to say it, and how to support your customers to boost satisfaction and sales

Once you gain a deeper understanding of what's required, it's time to write the scripts. This is the most lengthy part of the process and you have two options:

You assign a technical member of your team to oversee and handle this process

You offload this complex part of the buildout to your vendor's team of AI experts

**Meera handles the entire script writing and testing process as part of our campaign design service, ensuring your AI texting campaign is supported with highly personalized scripts.**



## Step 4: Train the bot with the script

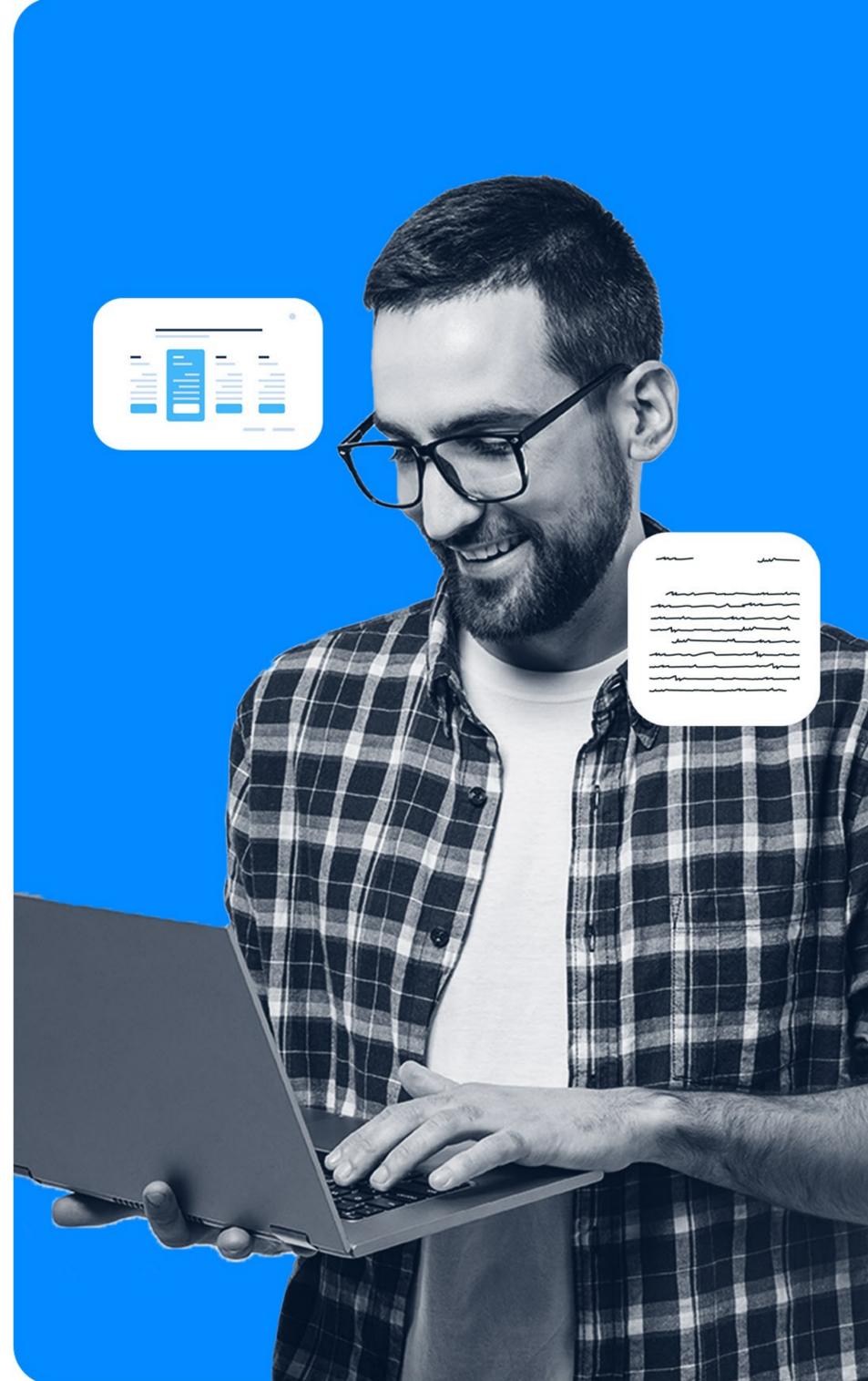
Scripts written? Next comes sending your campaign live to test and see if everything is working correctly. This shouldn't be seen as a one-time process, but more of a manual, ongoing one.

**You'll want to interact with the bot to see how it responds. This may include:**

- ✓ Asking specific questions and gauging its responses
- ✓ Identifying areas where it struggles
- ✓ Finding areas to improve conversation flow
- ✓ Looking at the back-end to measure performance, deliverability, response rates, and other focus areas

This requires very intensive monitoring and continuous improvement, and shouldn't be seen as a set it and forget it step.

For several weeks, keep testing and monitoring as you want to be certain your conversational AI isn't going off the rails.

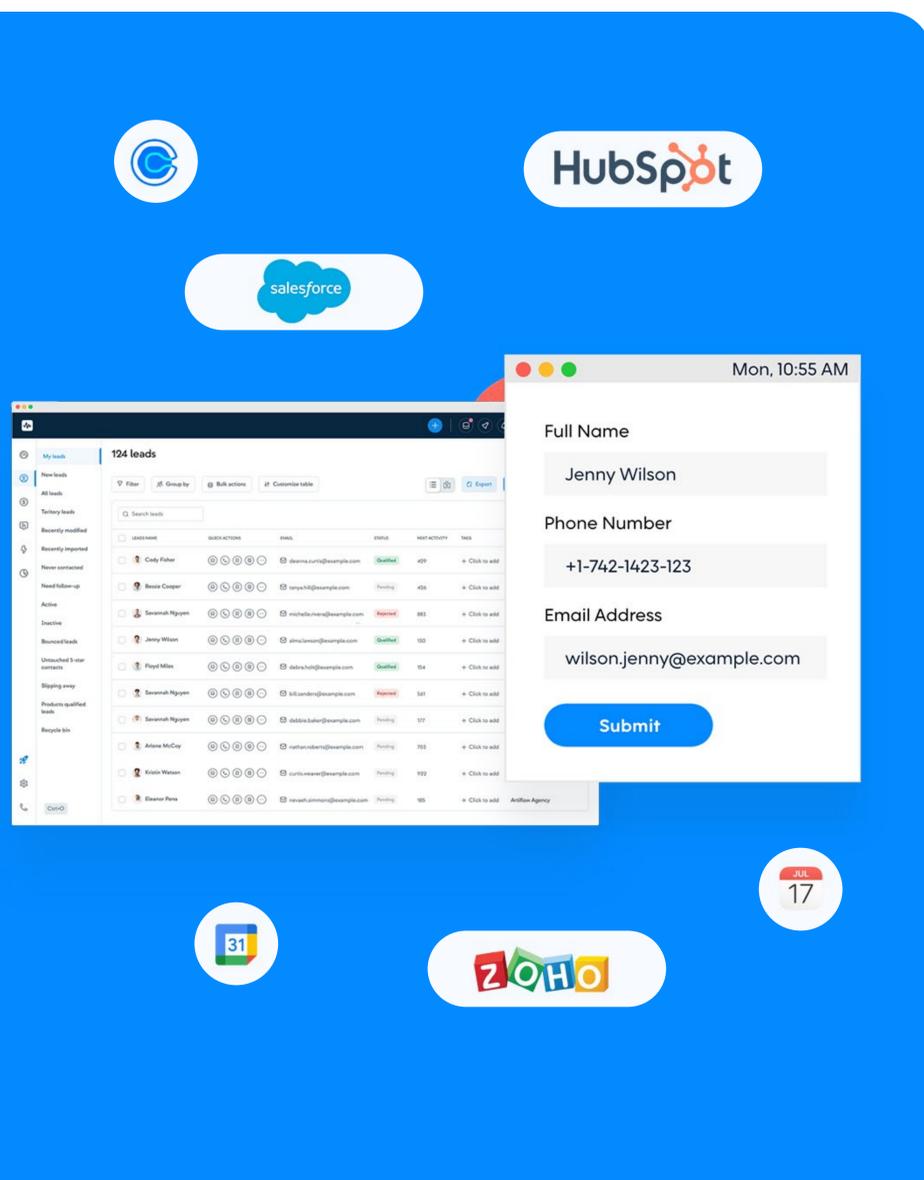


## Step 5: Integrate required applications

Integrations play an important role in supporting your conversational AI. However, this technical step is a delicate one and will require developers if you plan to manually integrate using your vendor's API.

**Looking for an easier way? You can take advantage of Zapier integrations to expedite this process.** This will allow you to support popular apps, including CRMs, calendars, and other apps in your workflows.

With the right integrations in place, your AI texting platform will be able to view leads in your pipeline, send text messages to campaign-specific leads, see and book meetings to individual calendars, and more (depending on what apps you've integrated).



## Step 6: Build the campaign out

Thought you were finished? You still need to buildout the campaign in the backend. This step includes a lot of smaller tasks that can make or break your AI texting campaign, including:

**You'll want to interact with the bot to see how it responds. This may include:**

- ✓ Making sure everything is configured properly
- ✓ Mapping out working hours for the conversational AI and available agents
- ✓ Performing call calibration

- ✓ Testing specific features like outbound calling, warm transfers, IVRs, and more
- ✓ Retesting the bot to measure performance
- ✓ Aligning and onboarding your teams on how to work with the conversational AI

All of these steps require a high level of awareness into the overall goals and objectives of the AI texting campaign. More importantly, be sure to spend additional time training your sales teams so they know what to expect from your conversational AI.



✓ Call Calibration

✓ Appointment scheduling

✓ Call transfer

## Step 7: Purchase your phone numbers

You're almost there! You'll need to purchase phone numbers for the campaign before you can send it live to the public.

This process may be done through your desired phone number provider or through your AI texting platforms back-end.

You will also want to consider whether you need localized numbers or not.

It's recommended to localize your numbers to make them more familiar to prospects receiving texts from your conversational AI. Once purchased, attach the numbers to your campaign.

**Note: Meera customers can purchase numbers directly through Meera.**



## Step 8: Complete onboarding and monitor campaigns

The final step is an ongoing one. You'll need to think about how you want to train and onboard your teams. After all, what good is your investment in AI texting if your teams don't use it properly?

You may need to develop an internal training guide for your sales teams. Alternatively, ask your vendor what training and onboarding materials they have. It's likely they've invested in creating helpful materials.

- ✓ Hands-on training to show them how Meera works, how to answer the phone, and other key features
- ✓ A demo showing how reporting works, what it includes, and how to access the reporting dashboard

- ✓ A dedicated AI expert to provide ongoing support, training, and guidance over the lifecycle of a campaign
- ✓ Ongoing monitoring to measure campaign performance

The most important thing is to always monitor and improve your campaign. Look for new FAQs to train the conversational AI. Keep your eye on KPIs like deliverability and response rates to identify potential issues before they get worse. And more importantly, ensure there's always a human available to step in and fix a problem.



## 4 examples of AI texting in the real world

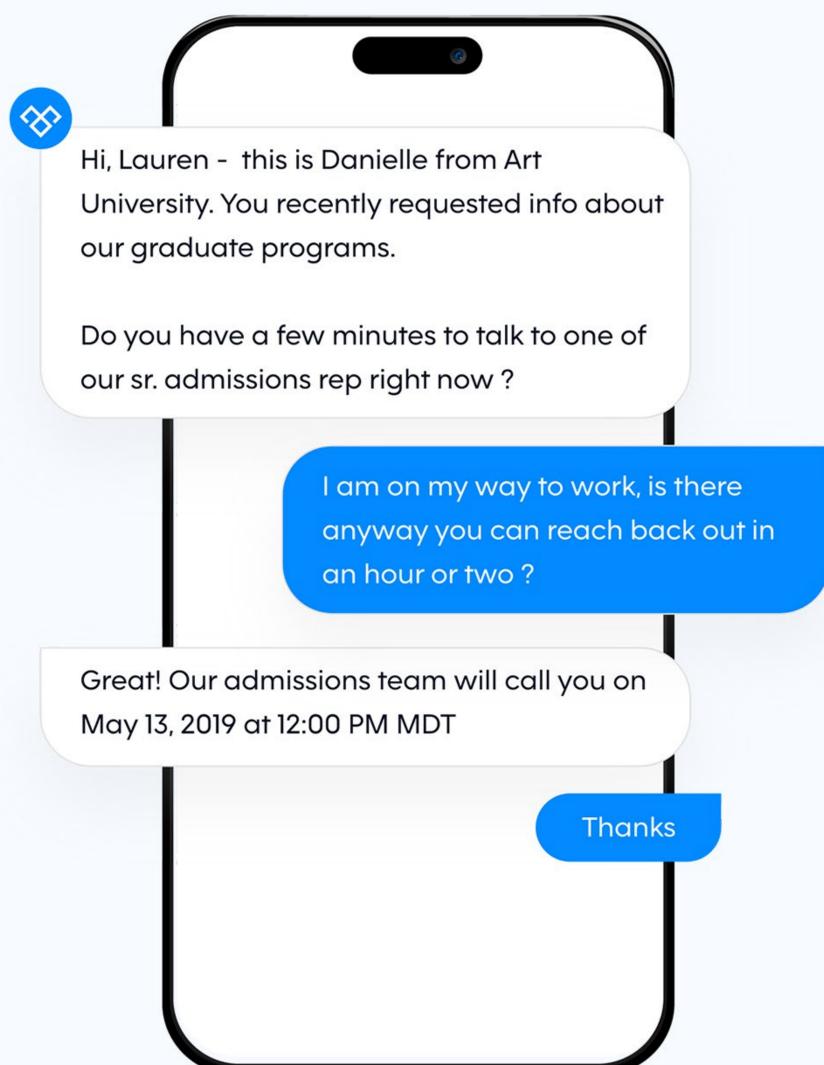
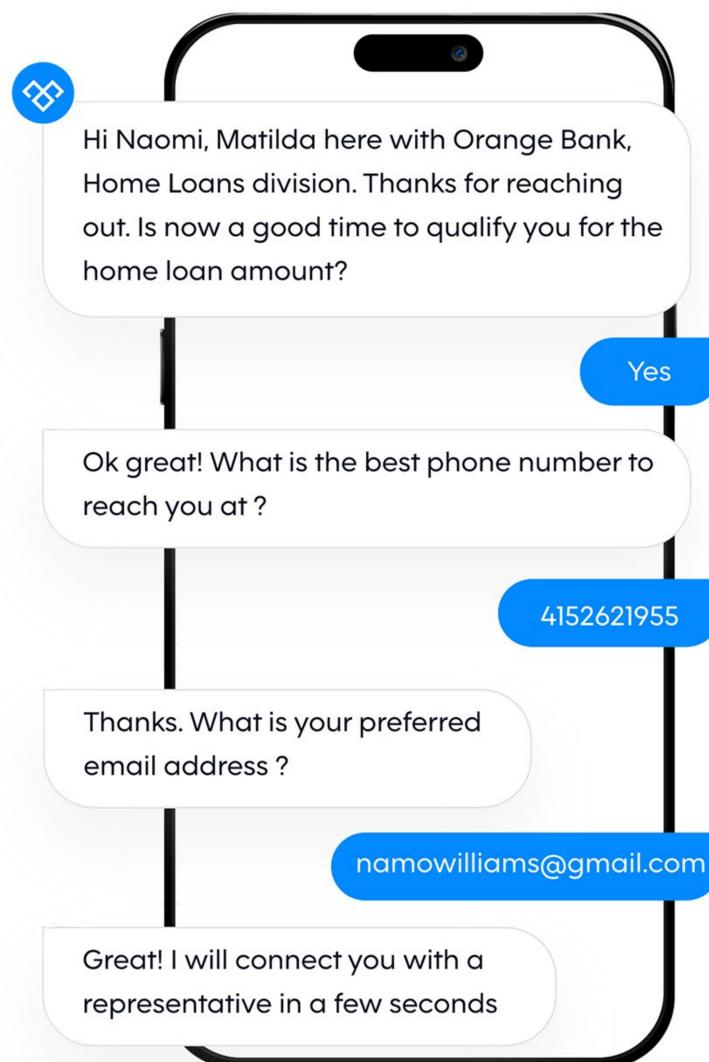
There are no shortage of ways companies can implement AI texting into their existing sales and marketing processes. But you're here for examples, so let's explore a few popular ones.

### Nurturing & engaging leads

Sales professionals only have so much time in a day. Every day requires striking the right balance between making calls, writing emails, sending follow-ups, rescheduling appointments, and all the essential lead nurturing tasks required to get a deal to convert.

**AI texting works to support sales agents by offloading the most time-consuming lead nurturing and engagement tasks to a conversational AI.**

This means new opt-in leads are instantly contacted, customer questions are answered, and basic customer interactions are handled automatically – freeing your sales teams up to focus on high-intent opportunities.



### Getting meetings booked

Getting leads to commit and show up to a meeting remains a key challenge for sales reps. Even with non-stop calls and follow-ups, nailing down a meeting and getting a prospect to actually show up wastes a lot of time.

AI texting handles this entire process for you by contacting and encouraging a high-intent customer to book a meeting. Conversational AI will contact the customer, respond to questions, support the customer using contextual information within the conversation, book the meeting for you, send reminders and follow-ups before the meeting, and even call and transfer the customer to an agent.

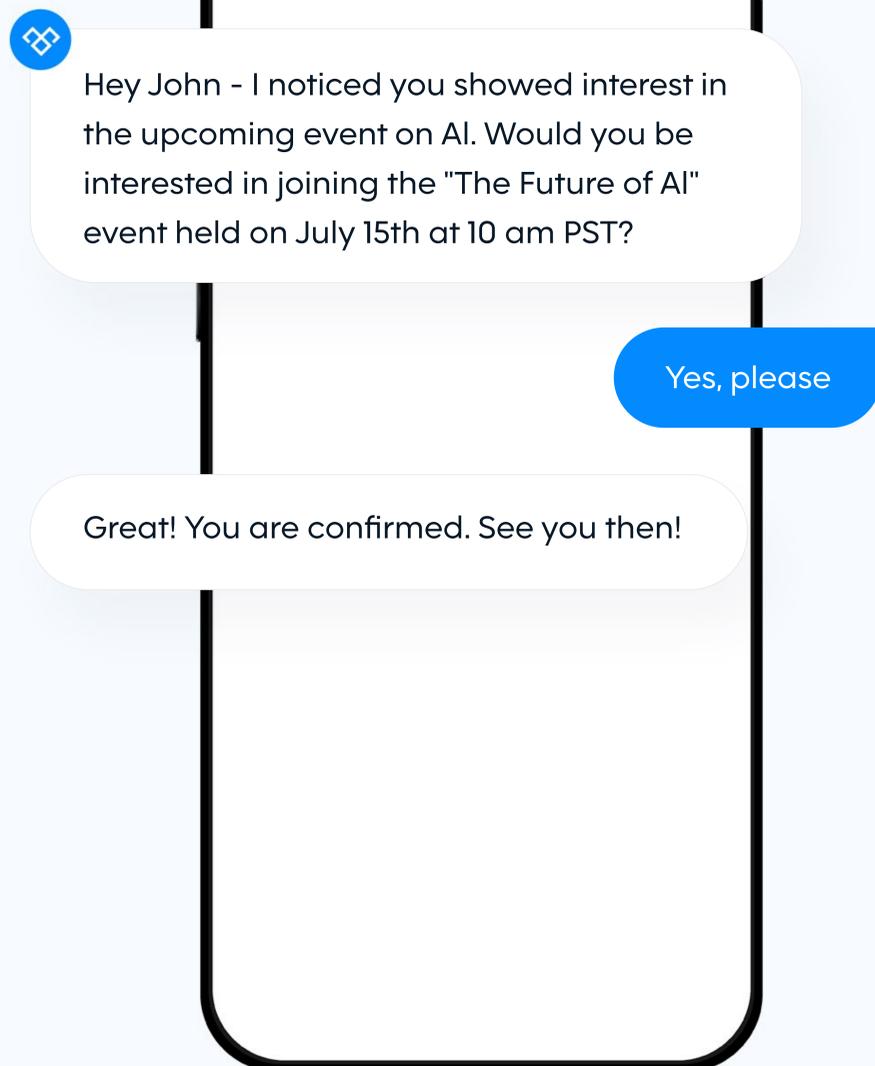
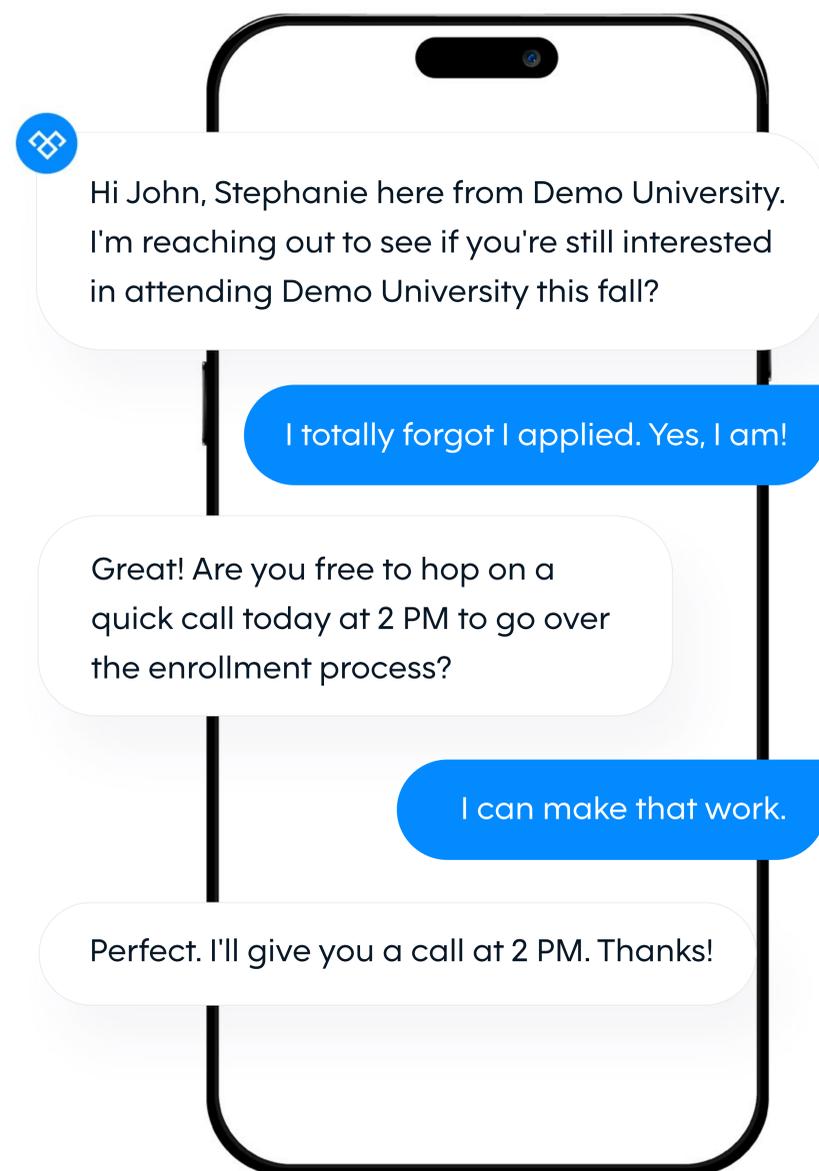
## Remarketing and engaging aged leads

It's not uncommon for companies to struggle with remarketing to aged leads. After all, sales teams have limited time as it stands and prefer to focus on fresher leads.

And yet, remarketing to aged leads who are already familiar with your business can lead to an uplift in sales.

AI texting campaigns can be configured to directly target existing leads in your database.

Whether you're promoting your core services, a special promotion, or looking to build awareness — conversational AI can handle the initial outreach, warming up, qualifying these, and converting these leads into actionable opportunities without creating any additional work for your busy sales teams.



## Managing events at scale

Keeping track of numerous events, attendees, and the endless correspondence is challenging. Your sales teams just don't have the time to follow-up with every lead, while sending scripted responses isn't personal enough.

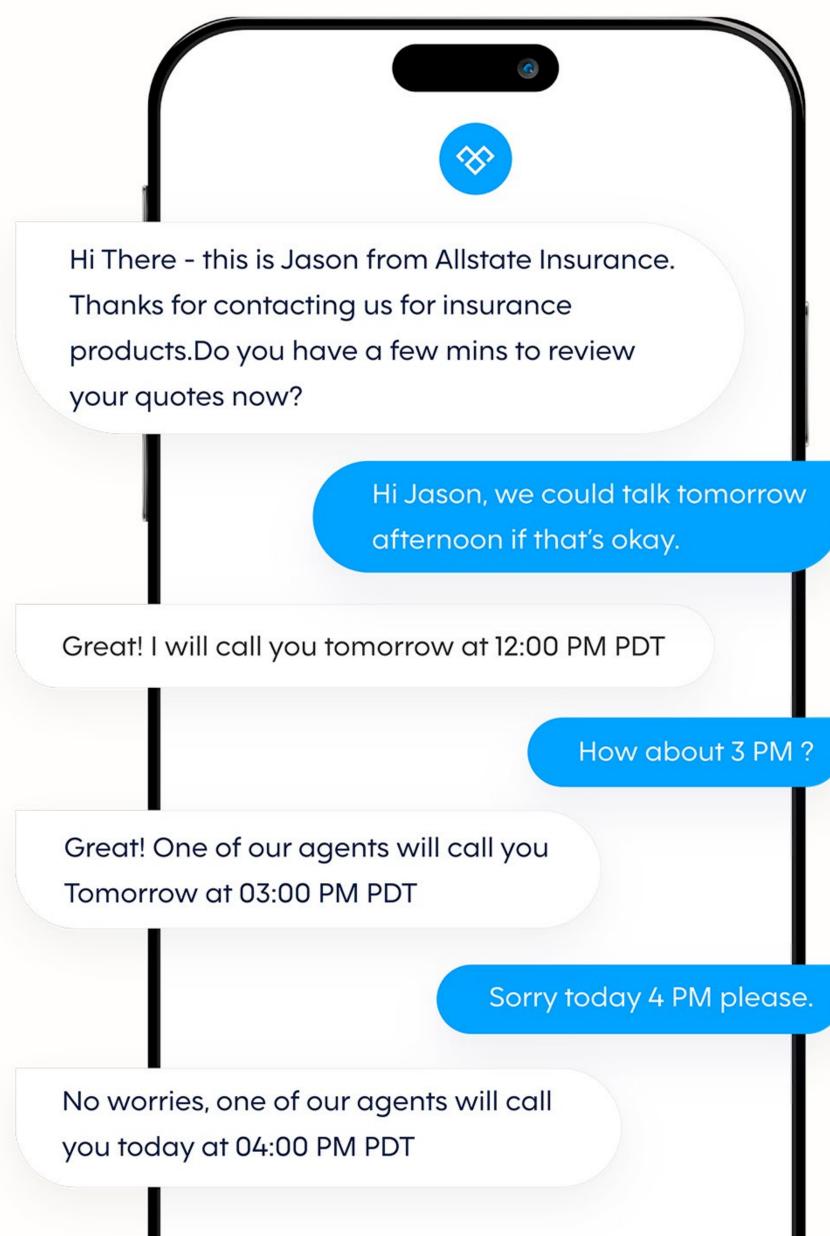
AI texting uses automation with a human touch to streamline scheduling and communications for your events.

Conversational AI will reach out to potential attendees to help them RSVP, send reminders closer to the date, and follow-up to see how their experience went. This saves your sales teams a lot of time while ensuring your pipeline stays filled with high-intent prospects.

# Start Your Next AI Texting Campaign **With Meera**

AI texting is already transforming the world of sales. Don't risk being left behind by early adopters in your industry. A successful sales automation strategy starts with AI texting.

With AI texting, you can automate and offload the busywork in your sales processes, freeing up your sales teams to focus on high-intent opportunities and closing deals without compromising on lead qualifying, nurturing, and engagement.



**Interested in seeing how seamless AI texting can be with Meera?**

**Book a demo**

and see how AI texting can accelerate sales pipeline growth.