WORKWAVE®

Guiding You to Hero Status!
Beyond Service 2026

CAPTIVATED
BUSINESS TEXTING

Austin Schmidt: Captivated
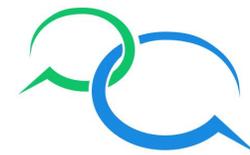
The Unspoken Question:

Is this going to be easy?

*"The best way to future proof a business is to become **ridiculously easy** to do business with."*

(2024 – Customer Experience Guru and Author ~ David Avrin)

The Unspoken Question: Is this going to be easy?

- Three barriers to being easy to do business with

  - **Response Time**

    - The game of phone tag: "If you ain't first, you're last"

  - **Consistent Communication and responses**

    - The Low Hanging Fruit> Pre/Post Service Notifications delivered every time
    - Same Day responses, *Every time*

  - **Convenience**

    - How hard do customers have to work to do business with you? Build a better bridge to your customers

The Game of Phone Tag

An everyday scenario:

1. Potential Customer leaves a voicemail wanting an estimate

2. You return the call>Leave a voicemail

3. Customer calls back the next day (If you're *lucky*)-Leaves a voicemail (If you're *really lucky*)

4. Return the call the same day-Voicemail

5. You reach back out again the next day and connect

6. The Result: Customer already found a service provider before you ever connected:

   "Maybe next year if it doesn't work out. I already prepaid."

A simple text message organizing a time to call the customer back wins the deal.

It wasn't a lack of **effort**, **price**, or **service...** it was <u>*timing and convenience for the customer*</u>.

"If you're not first, you're last."

Response Time

If you do not have a live answer for inbound calls, be sure to have a greeting that sets expectations on the timing of a return call and then meet or beat those expectations.

Always add: *"For your convenience you can also text our office at XXX-XXX-XXXX."*

- Per Harvard Business Review:

  - *"You are **100 times more likely** of winning business if the response time is **less than five minutes**"*

- Per Jay Baer Author of <u>Time to Win</u> (2022):

  - *"49% of customers are less likely to spend when a brand takes longer to respond than they expect it should"*

Building A Better Bridge

- **Are you giving your customers the option to communicate how they want to?**

  - We're not replacing people, or the personal touch you've built your company around–It's a tool to make it easy for your customers

  - Texting is a shortcut to and easier for all parties to communicate even if it's used for simple coordination of a time to connect with a phone call or at home visit

  - Give your customers every opportunity to connect with you in the way that works best for them: Text, Phone, or Email

- **Did you know?**

  - 80% of customers list texting as their preferred method of communication instead of calls and emails

  - 42% of outbound calls by businesses are missed or ignored

  - 98% of people read a text within 3 minutes

Everyone Is Texting - *Are You?*

- *"The 45 to 65 year age range, will soon to meet or exceed messaging by those in their 20's"* **(Skywire)**

- *"On average, Americans exchange five times as many texts as they do phone calls."* **(Informate)**

- *"Sixty percent of over-45-year-olds say that they are just as likely to use texting as voice calling."* **(Mobile Marketer)**

- *"People aged 45-64 are the fastest growing demographic on the mobile frontier."* **(Nielsen)**

- *"Texting is on the rise for small businesses, as 58 percent text for business at least once a month."* **(Forbes and Cisco VNI Update)**

Advertising the Bridge

- Review the CTAs on your website/advertising: Always add "text or call"

- Change your voicemail Greeting: Add *"Feel free to text us back at XXX-XXX-XXXX!"*

- Have a template to share your virtual business card:

  *"Great connecting with you **{{salutation}}**, here is our contact information to save to your phone."*

Learn more about Captivated contact cards here

Attach Contact Card ❎

Captivated

Austin Schmidt

📍 5875 Castle Creek Parkway North Drive, Suite 260
Indianapolis IN 46250

Saved Contacts Matter More Than Ever

With recent messaging updates from both iOS and Android, there is likely an **"Unknown Senders"** message filter that automatically separates messages from any numbers not saved in the recipient's contacts.

Messages from unsaved business numbers may:

- Appear in the Unknown Senders folder (not the main inbox)
- Deliver without a notification
- Appear less trustworthy or look like spam

Recommended Practices:

- Send your contact card to all new customers during onboarding or first contact.
- Periodically resend it to long-time customers to ensure your info is up to date.
- Use a friendly, branded contact name so your messages are instantly recognizable.
- Encourage staff to use the same business contact when messaging customers.

Learn how to send a Company Contact Card here

Putting Captivated to Work

- **Team Visibility**
  - Conversation Filters
  - Internal Communication

- **Service Notifications**
  - Pre-Service
  - Handling Reschedules

- **Google Review Requests:**
  - Gather customer feedback and Google reviews in real time

- **Virtual Door Knock:**
  - Improve communication between customers and technicians

- **Group Messages:**
  - Ensure none of the relevant contacts are out of the loop

Conversation Filters

- **Administrative Team**
  - Full Insight into active communications
  - Missed Responses

- **Saved Searches**
  - Create an advanced search using these options: users, teams, channels, contact/company name, tags, conversation status.

*Learn More about Conversation Filters here

Internal Communications

Internal Notes, Mentions, and Scheduled Reminders:

- Create internal only notes for your team right on the active conversation

- To easily add a team or an individual user to a conversation that you own, use our **@mentions** feature.

    - Loop in a managers or provide "Warm hand-offs" to teammates

- **Schedule reminders** within Captivated for follow-ups or check-ins post service
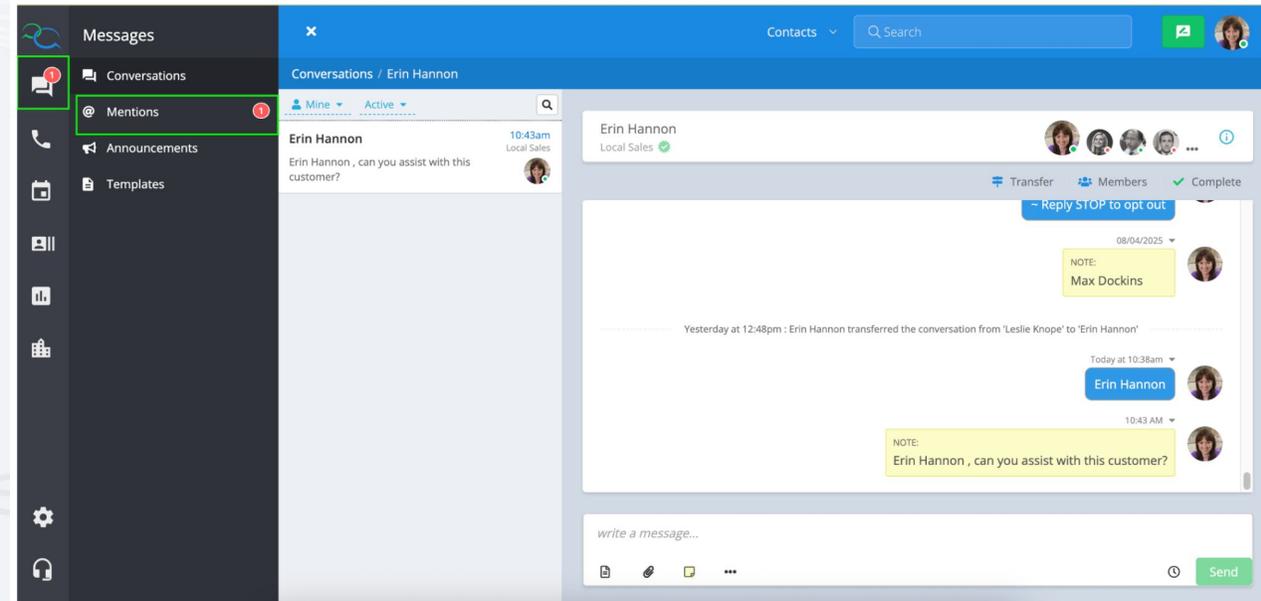
Pre-Service Notification

- Use the **"Action"** or **"Send to"** tool to send bulk messages directly from SA5

  - Route List

  - Reports

    - Unserviced List Report–Filtered to specific needs
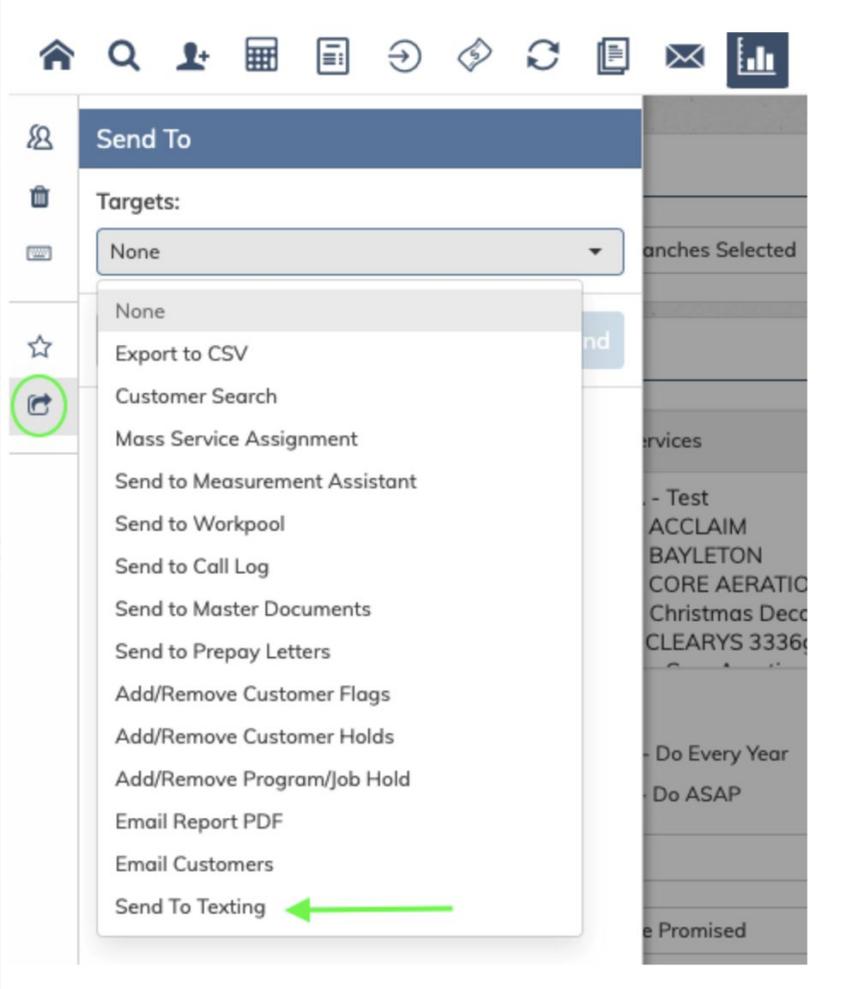
Handling the Reschedule Request

1. You send a pre-service notification in advance via text.

2. The customer responds and says *"Can we reschedule for next week?"*

- Use a pre-canned dynamic template:

  - *Hi **{{salutation}}**, no problem, we can get you back on the schedule **{{when}}**, does that work?*

This process is handled in **seconds** instead of handling an inbound call that could last 5-minutes. Worse yet, you could start a game of phone tag.

*Learn about Templates here

Google Review Request

- Easily send a **Google Review** request right through Captivated

- Conduct **NPS Surveys**

- Use the **Captivated Dashboards** to see which employees gather the most reviews.

  - Run team competitions in the Spring and Fall!

*See it in action here or learn more here

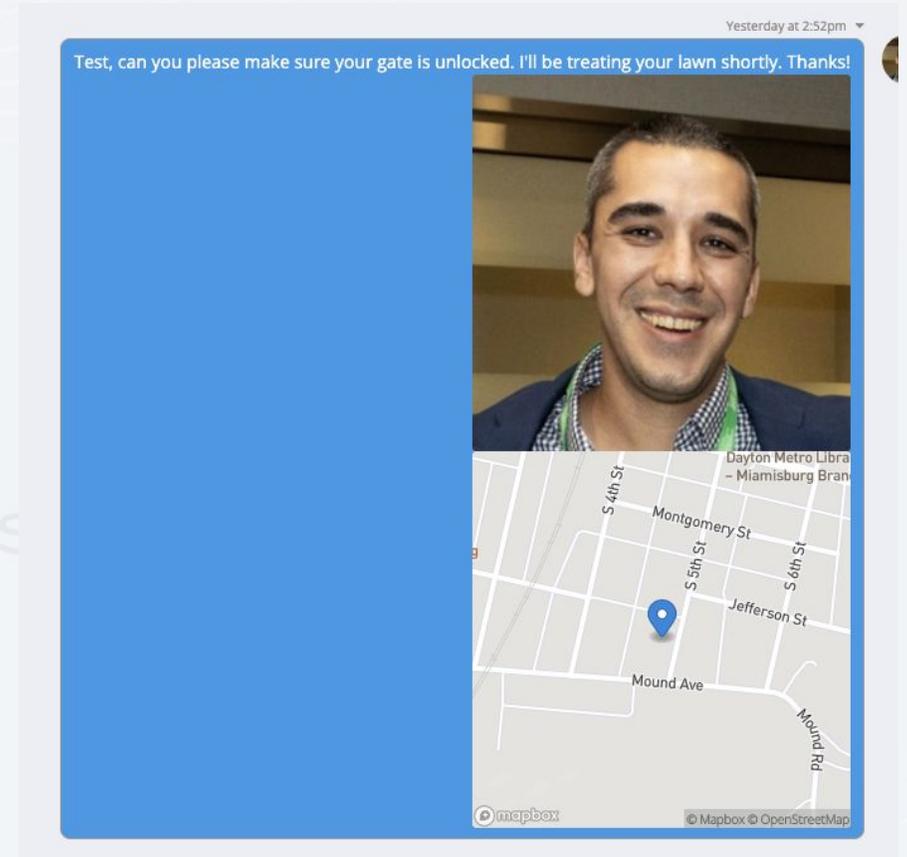*Learn about automated NPS collection with our Automations and Workflows functionality here
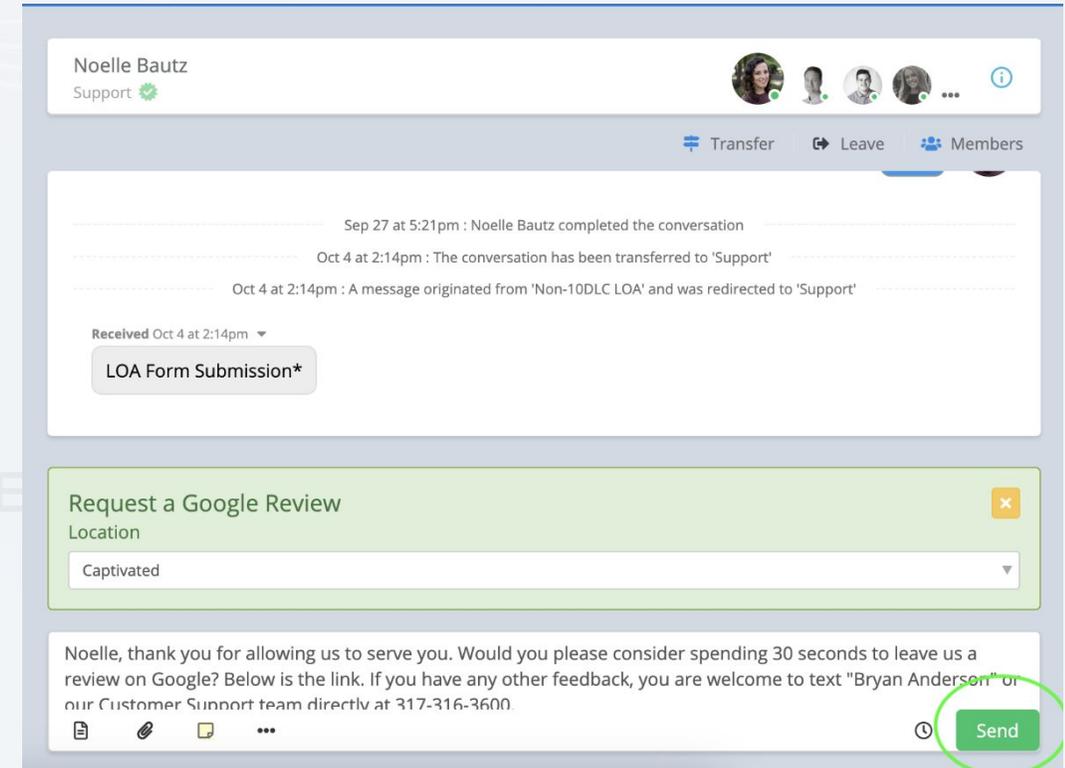
Virtual Door Knock

- **Answer these questions with one text right from the field with VDK**

  - *Who is coming?*
  - *When will they be there?*
  - *What are they doing?*

- **Send Service Confirmation at time of service**

*See it in Action [here](#) or learn more [here](#)

New Feature! Group Messages

- Our recently released **Group Messaging** feature allows you to include multiple contacts into *one* group message

  - Great for texting the Mr. and Mrs.

  - Ensure no surprises or miscommunication both before and after service
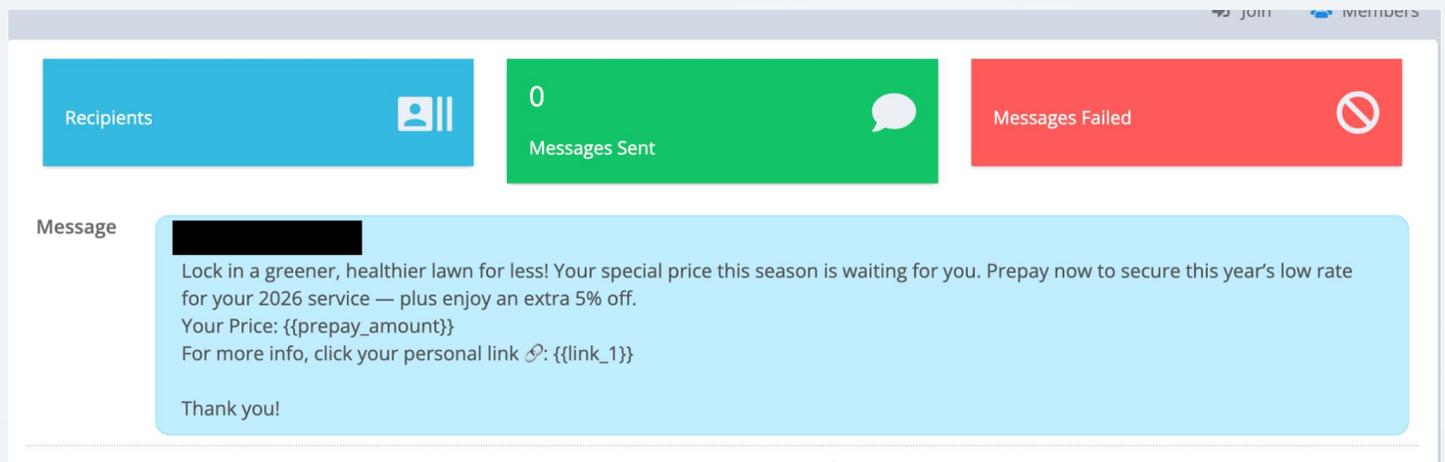
*Learn how to initiate a group message here
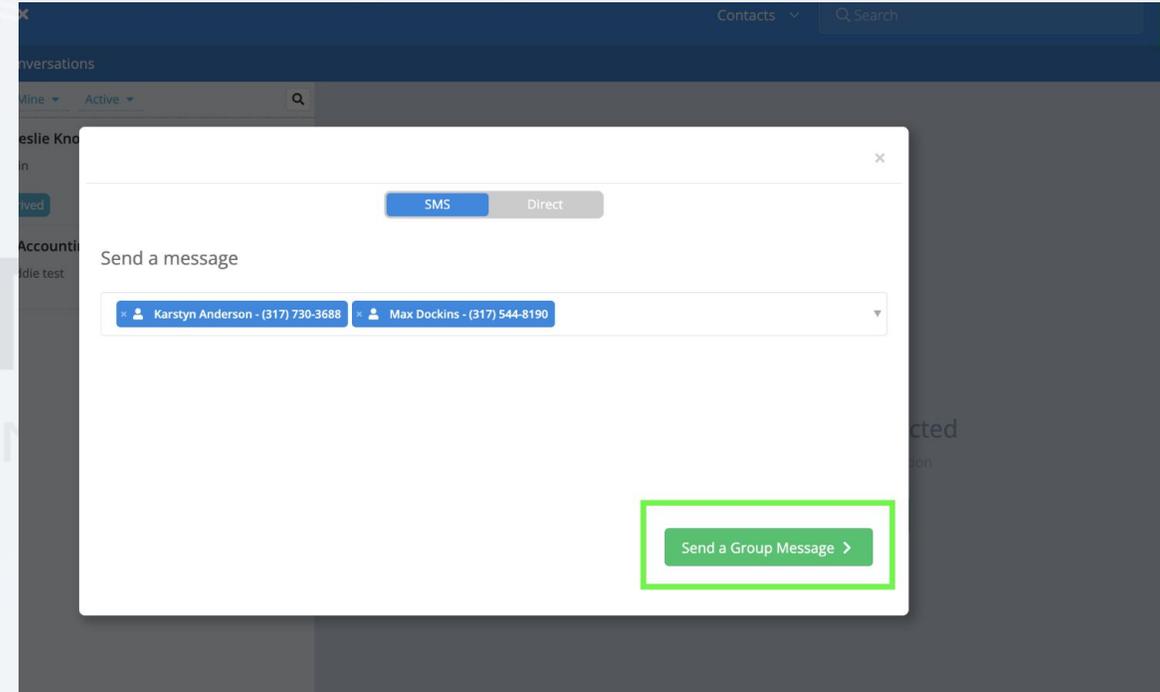
Announcements: Mass Notifications

- Send *Condition Updates* and *Marketing Texts* with **Announcements**

- Insert **Custom Fields** and **Tag Contacts** using the CSV Import tool

  - Upload Unique Pricing/Balances, Customer Numbers
  - Identify Groups of customers with our Tagging System
  - Send "Announcements" to specific tags for targeted messaging

*See Announcements in Action

Learn About:

- Announcements
- Custom Fields
- Importing customers
- Tags

Texting FYIs

- **Segments**: Learn more [here](#)

- **Carrier Limits** (MMS Attachment limits (PNG)): Learn more [here](#)

- **Compliance and Opt-Out Reports:** Learn more [here](#)

- **Long SMS vs MMS:** Learn about the benefits of MMS [here](#)

Connect with Me

Come see us at Booth 4 in the partner hall!

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BEYOND SERVICE
CUSTOMER CONFERENCE '26