

# Best Practices for Conversational Text Messaging in Real Estate



Incredible product. Smooth integration with our Salesforce and quality people.

- Tyson Joe,  
Director of Operations,  
The Heyl Group at Keller Williams

## Start the Conversation with Digital-Age Home Buyers

The way people communicate in their personal lives is changing. They make fewer phone calls, send fewer emails, and mail letters about as often as they use a telegraph. This is particularly true for millennials and Gen Xers, who by and large keep in touch by texting. They also make up the majority of today's home buyers.

As response rates for email, phone calls, and physical mail continue to decline, it's vital that you adapt. By adopting the right technology, you can communicate with digital-age home buyers on their terms, in their language.

The next generation of buyers prefer to communicate via text. Fortunately, conversational text messaging will also make your job easier and help you sell more effectively. SMS messaging platforms can automate a lot of your day-to-day inquiries, save you time, help you serve your clients better, and of course, help you close more deals.

Sounds like a win-win, right? In this whitepaper, we'll demonstrate how you can make conversational text messaging work for your real estate business by:

- Getting buyers to buy in to text messaging
- Guiding clients through the home buying process with messaging
- Writing effective text message conversations
- Integrating conversational text platforms with your CRM

First, let's see how to sell home buyers on conversational text messaging.

## Getting Started with Conversational Text Messaging

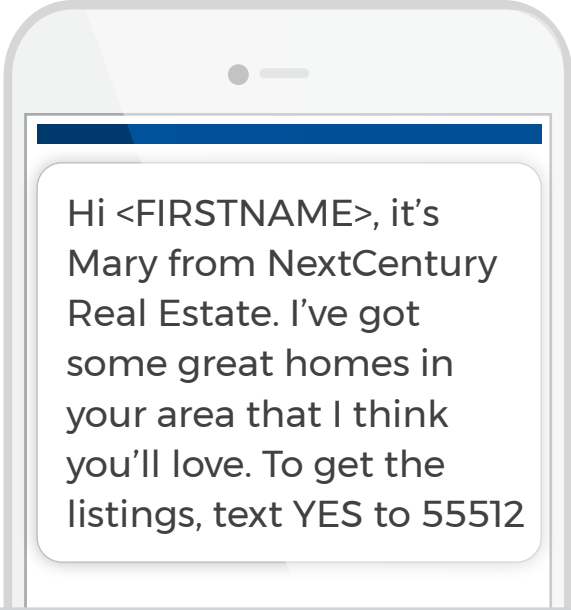
Potential home buyers are seeking information on everything from property details to the buying process. When they come to your agency for help, responsiveness is key. Nearly 80% of today's buyers expect real estate agents to respond to inquiries within a day and over 40% of them want a response within hours, according to research by Zillow<sup>[1]</sup>. If you don't respond quickly, you don't get the client.

Getting back to everyone by email and phone can become an all-consuming task, so you have to use the right technology to connect with digital-age home buyers. Since 70% of home buyers are now millennials or gen-Xers, it only makes sense that text messaging is the solution.

Using a conversational text messaging platform can help you respond to buyers faster and reduce the amount of time you spend fielding inquiries so you can handle more leads and continually build your database.

## Use Your Existing Database

Just as you use your database to mine leads through email or by mailing postcards, you can use it to begin communicating with leads via text. Start by sending a message to all your current leads to let them know you can keep them up to date with text messages. This will also serve as an opt-in confirmation for future messages.



Hi <FIRSTNAME>, it's Mary from NextCentury Real Estate. I've got some great homes in your area that I think you'll love. To get the listings, text YES to 55512

When a lead replies "yes" to this message, they are automatically sent a series of property listings that fit their needs according to information you have previously entered in your database. This way you don't have to make a call or send an email every time a new home comes on the market and the client can then let you know if they need more information or want to see a home.

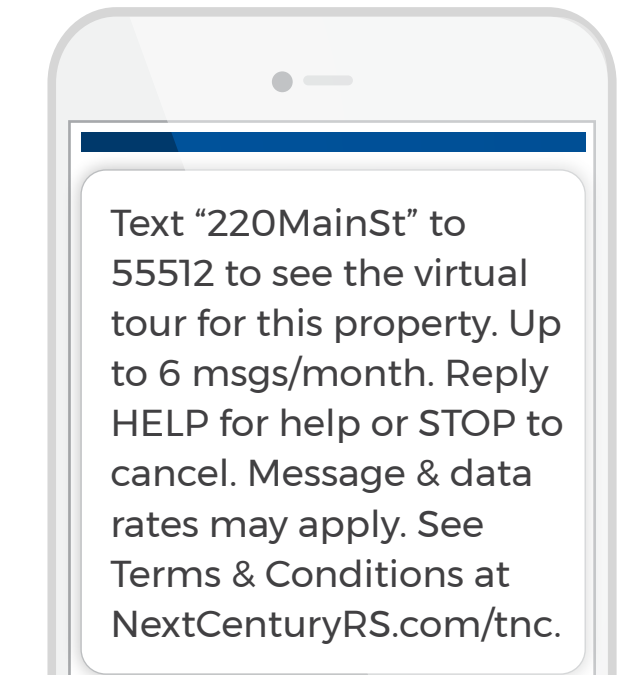
## Add Texting to Your Home Listing Marketing

Studies show that 90% of leads prefer to receive text messages over calls from a sales representative. Fortunately, real estate agents have many opportunities to let home buyers know that information is available by text message. You can offer your text-based services on all of the marketing materials you already use, like your website, direct mail, online and print ads, social media, property listings, and flyers.

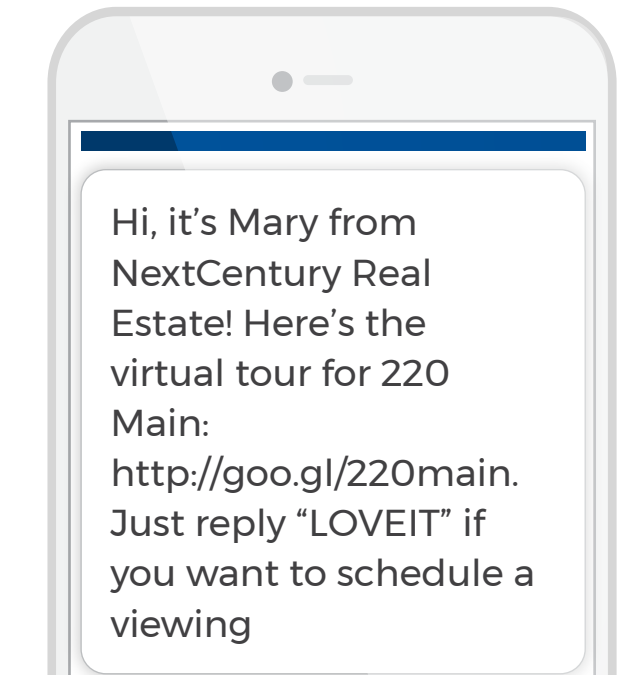
## How to Get the Opt-In

Say a house hunter stops by one of your properties and grabs a flyer. On the flyer, you can offer to text them real-time updates on the status of the property and to send them information on similar homes.

To invite home buyers to opt-in to your text messaging services, include a message with an SMS short code in your promotional materials and advertising. For example, on a property listing flyer, the message might look like this:



Once the buyer opts in by sending a text to 55512, they are sent a link to the virtual tour and your SMS platform automatically adds them to your database as a new lead.



Not only do you now know that this is a hot lead, but you get a wealth of information about the buyer—what type of property they are looking for, what area they're shopping in, etc. From here, you can send them more targeted listings, automatically schedule showings, and up your chances of finding exactly the home they are looking for. This same tactic can be used on any of your marketing materials and mailers.

Note that most messages can be sent automatically by an SMS marketing platform like SMS-Magic. You don't have to spend all day responding to text messages instead of fielding phone calls—the platform uses keywords in the texts you receive to send the appropriate response, and it notifies you when you need to take action or when an event happens such as when a new lead is added to the database. Of course, you can manually intervene whenever you want to add a personal touch or answer a complex question.

## A Few Rules to Follow

Text messaging is a cost-efficient and effective way to engage home buyers. There's just one hitch—prospects and customers must “opt-in” (give you specific permission) to send them marketing text messages.

Text messages for business falls under the Telephone Consumer Protection Act (TCPA), which is the main anti-telemarketing law in the U.S.

Here's how to comply:

- Get your home buyers to opt-in as discussed above.
- Make sure the invitation you include on your marketing and sales materials tells them what to expect; number of messages per month and types of messages -- listings, virtual tours, community information, etc. And make sure you meet the expectations you set.
- Give them a way to opt-out of your text messaging program, should they want to. Use a keyword like “STOP” to opt out and communicate it occasionally. The beauty is that an advanced SMS texting platform will automatically remove them from your list to keep you in compliance.

Check out the [TCPA Guidelines<sup>\[2\]</sup>](#) for Text Marketing to assure that you're following the rules and always remember to text your clients the way you would want to be texted.

## Use Text Messaging to Make the Home Buying Process Easier

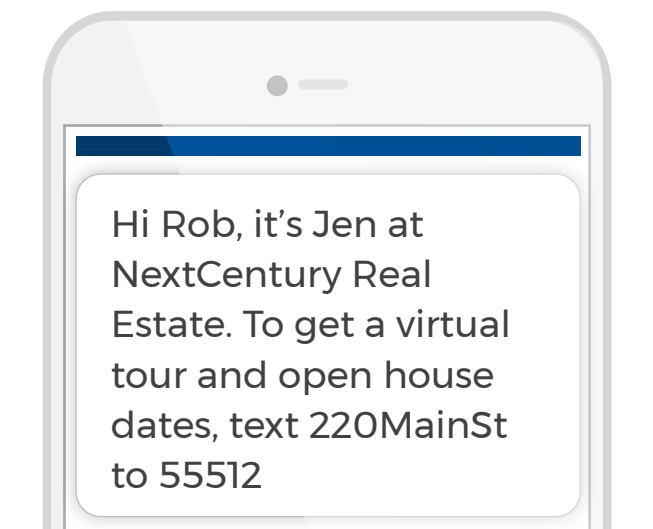
Once a buyer opts into your SMS text messaging program, you know that you have their attention. This is your opportunity to begin building a meaningful, trusting relationship with them by guiding them through the home buying process.

You know that home buyers, particularly first-time buyers, can come at you with a lot of questions. As you move through the buying process from inquiry to show to sale, they come at an increasingly furious pace and with escalating urgency. Using conversational text messaging can help you keep up with it all, serve more clients, and build better relationships with all of them.

Here are some examples of how you can use text messaging to guide home buyers through the purchase process.

### Respond to Initial Inquiries

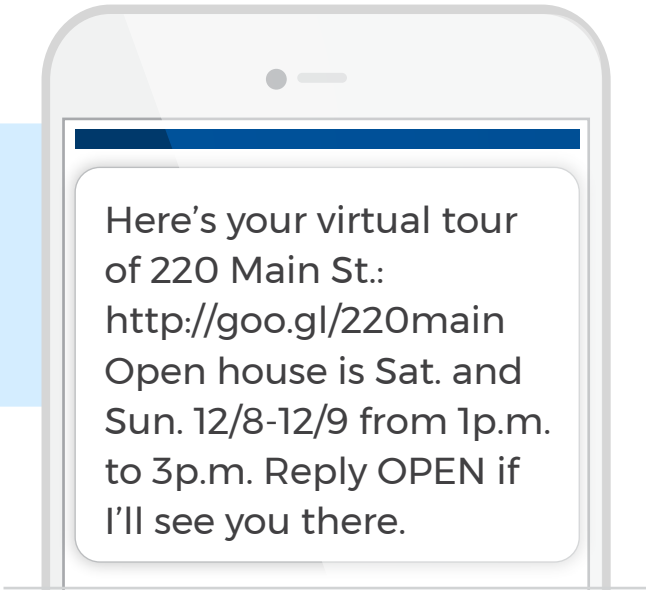
Simply responding to basic inquiries about your property listings can monopolize your time. Fortunately, you can easily automate your most popular buyer questions and reduce the time it takes to respond to them. Your replies will be faster and your buyers are sure to appreciate it. Here's how you get the conversation started with a basic inquiry.

A stylized illustration of a smartphone with a white screen and a grey border. The screen displays a text message with a blue header bar at the top. The text of the message is centered and reads: "Hi Rob, it's Jen at NextCentury Real Estate. To get a virtual tour and open house dates, text 220MainSt to 55512".

Hi Rob, it's Jen at  
NextCentury Real  
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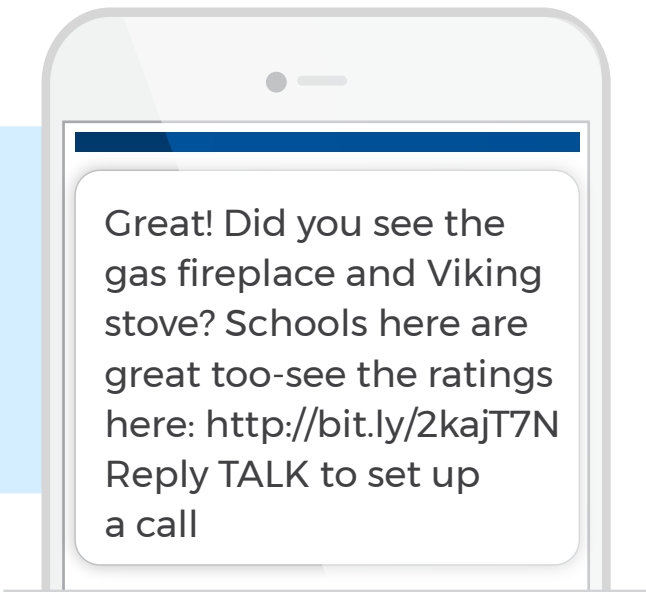


When the buyer sends the text, the SMS platform triggers an automated response based on the keyword "220MainSt."

A white smartphone with a blue status bar at the top. The screen displays a text message with a white background and a blue header bar. The text of the message is as follows:

Here's your virtual tour of 220 Main St.:  
<http://goo.gl/220main>  
Open house is Sat. and Sun. 12/8-12/9 from 1p.m. to 3p.m. Reply OPEN if I'll see you there.

When the buyer replies, your pre-set workflows can also send additional details about the house like amenities, special features, information about schools and more to pique their interest. For example-

A white smartphone with a blue status bar at the top. The screen displays a text message with a white background and a blue header bar. The text of the message is as follows:

Great! Did you see the gas fireplace and Viking stove? Schools here are great too-see the ratings here: <http://bit.ly/2kajT7N>  
Reply TALK to set up a call

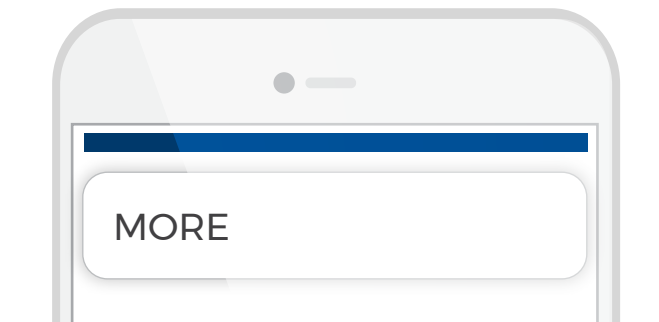
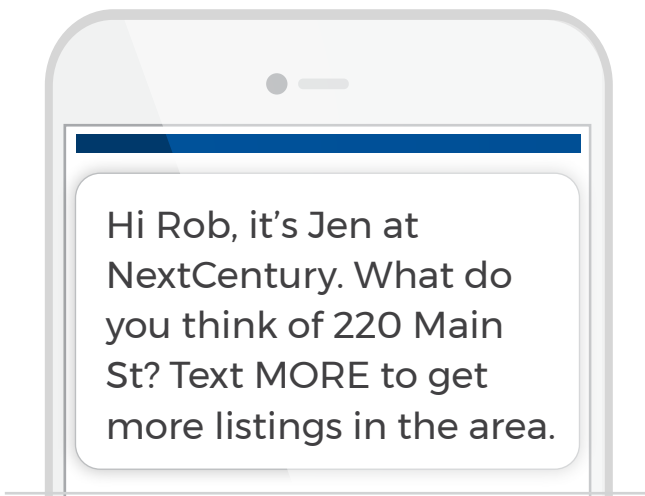
The top reason why buyers choose and give referrals to agents is response time, according to a recent CAR survey<sup>[3]</sup>. The more responsive you are, the more likely it is that you'll get the sale, and the more likely it is that you'll be recommended to others.

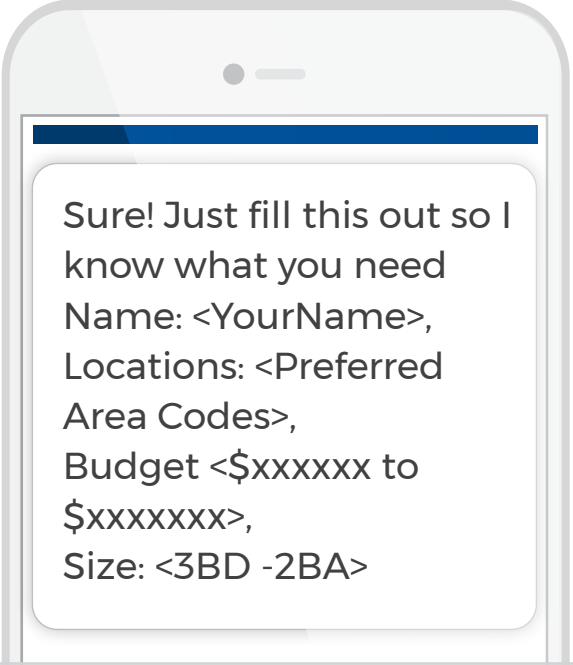
Answering your buyer's questions quickly via text not only helps you build a trusting relationship, it allows you to build detailed profiles of all your clients.

## Build Your Buyer's Profile

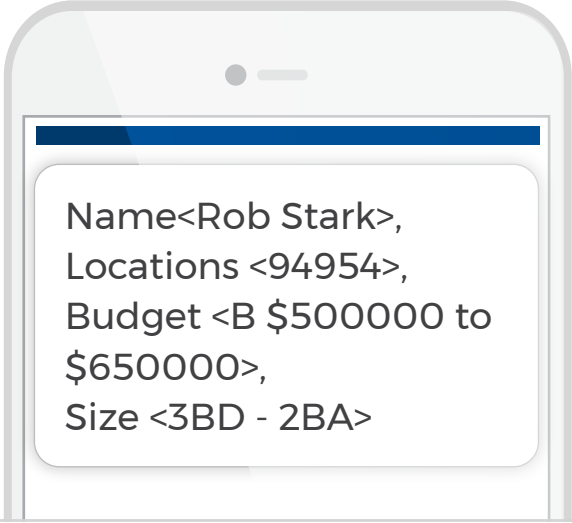
The more you know about your buyer, the faster you can help them find the right home. You can gather all the information you need with texts simply by asking the buyer a series of questions. The answers are then added to your database, allowing you to automatically send your buyers listings, updates, and information that will help speed the time to closing.

You can start building the profile as soon as a buyer asks for information about a property.

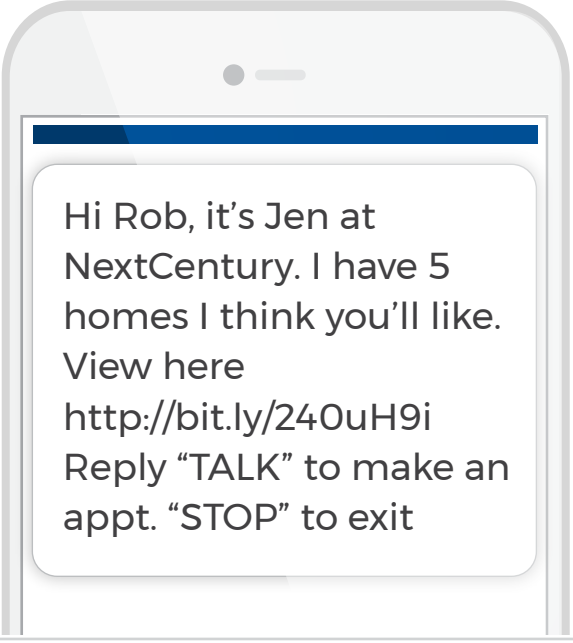




Sure! Just fill this out so I know what you need  
Name: <YourName>,  
Locations: <Preferred Area Codes>,  
Budget <\$xxxxxx to \$xxxxxxx>,  
Size: <3BD -2BA>



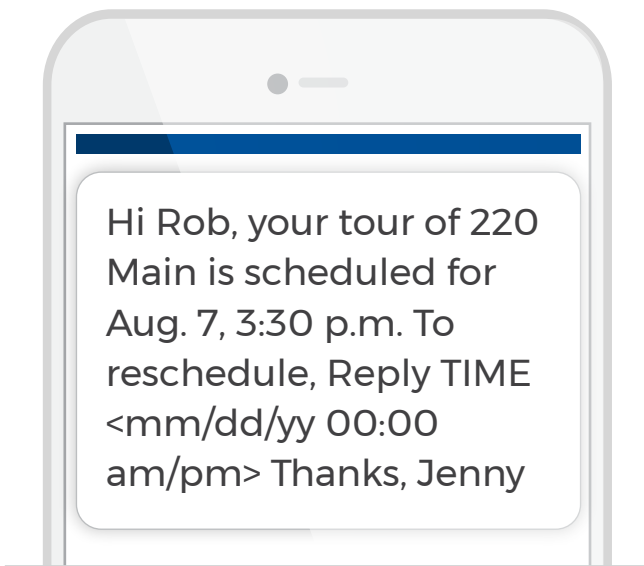
Name<Rob Stark>,  
Locations <94954>,  
Budget <B \$500000 to \$650000>,  
Size <3BD - 2BA>



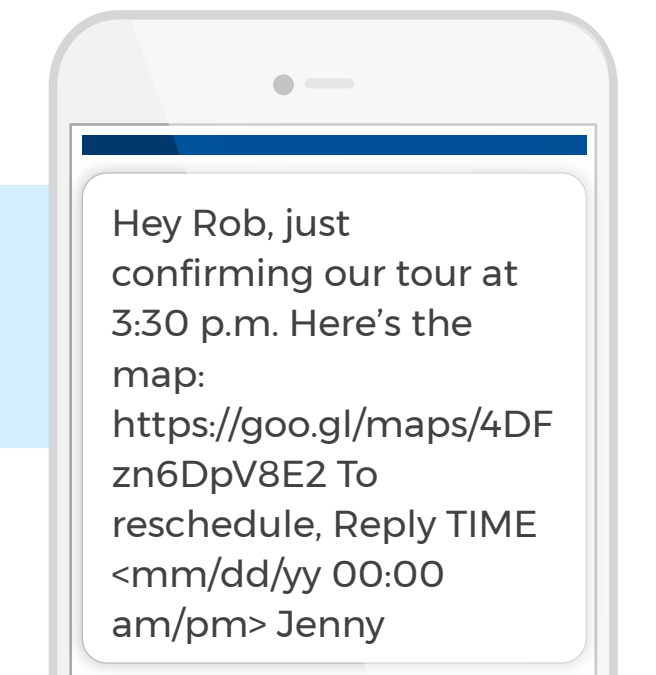
Hi Rob, it's Jen at NextCentury. I have 5 homes I think you'll like.  
View here  
<http://bit.ly/240uH9i>  
Reply "TALK" to make an appt. "STOP" to exit

## Schedule Showings and Meetings

Your appointments take up a big chunk of your day. To make the most of your valuable time, you can schedule and confirm appointments by text, automatically send reminders, and make rescheduling easy for both you and your clients. Allowing buyers to schedule and reschedule by text will help keep you on top of everything and reduce the no-shows that can waste so much of your time.



An hour before your appointment, you can send a reminder and give an opportunity to reschedule:



## Send Property Alerts and Updates

You can get ahead of many questions just by sending automated alerts and updates to buyers about properties they are interested in. A few examples of this include:

- Price changes
- Offer submission deadlines
- Status changes (in-contract, pending, sold)
- New similar properties on the market
- Interest rate changes

Guiding your buyers through the buying process with conversational text messaging lets you be there for them every step of the way while saving you time. It helps you talk to buyers on their terms and keep them engaged until the day the keys are in their hands (and the commission check is in yours!)

## Writing Effective Text Message Conversations for Home Buyers

You know how to send a text message, right? A smiley face here, a LOL there, and send, right? Not quite. Creating effective conversational text messaging for your real estate business requires a bit more finesse than texting friends and family. By following these best practices you can build a text messaging program that keeps clients informed, engaged, and prepared to buy.

## The Anatomy of an Effective Text Message

No matter what the message is, you can make it more effective by following these simple rules.

### Stick to One Thought per Message

SMS text messages are limited to 160 characters before they are split off into multiple messages. To make sure your messages are clear, limit each message to one subject and one call to action. It is better to send several related messages spaced out over time than try to cram everything into one text. Test your text by sending it to your colleagues to make sure it is easily understood and that the call to action is clear.

### Keep it Professional

While your kids use a lot of slang and abbreviations when they text, using them in your business text can cause confusion and a lot of eye-rolling. It's best to use professional language and spell everything out, but skip the \$100 words. To make sure your messages are taken seriously, always be sure to double check spelling and grammar. Also, avoid the emoticons unless your buyer is using them, too.

### Make it Personal

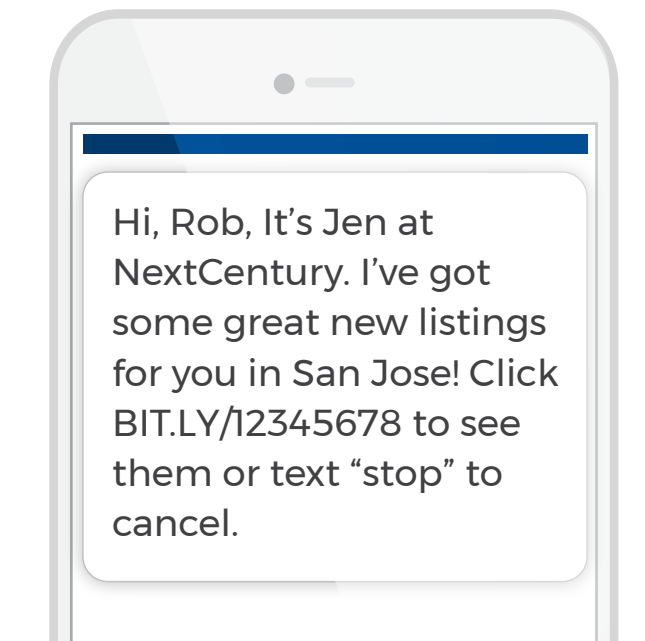
Personalizing your messages makes them feel more human and assures that the recipient knows who it is coming from and why. Include your name, the name of your agency, and the recipient's name in your messages. This is especially important in your first communications with a buyer, as they may be working with multiple agents.

### Utilize Formatting

Thoughtful formatting can greatly increase message clarity. Using a return (paragraph break), for example, consumes only a single character in SMS and makes messages easier to read. Use capitalization for emphasis rather than squandering space on special characters like asterisks. Also, capitalize important information such as the call to action, phone number, SMS keywords, URLs, etc.

## Give the Option to Opt-Out

No matter how well you segment your audience, some people will want to stop getting your messages. Be sure to offer opt-out opportunities (e.g. Reply 'stop' to stop) but you don't have to emphasize the option by using capitals or bold text. Always ensure that the call to action is more prominent than the opt-out.



## Integrate and Automate

Conversational text messaging isn't just you firing off text messaging from your phone. Messaging platforms like SMS-Magic rely on automating workflows and interacting with your CRM database so you don't have to do all the heavy lifting.

### What's a Workflow?

Workflows are essentially like automated templates that you build based on the expected interactions with your buyers. Using keywords (like texting "220MAIN" to 55512) triggers a text with a link to the virtual tour. From there, the keyword "MORE" triggers a text to send more listings. Then, when the buyer texts "TOUR" they get a message to schedule a home tour with

you, and so forth. While you can intervene at any time to answer a question, most of this will happen automatically.

### CRM Integration Ties it Together

You and your agency probably use a Customer Relationship Management (CRM) platform like Salesforce to create a database of buyer information, track conversations, analyze performance, and to engage leads. Conversational text platforms like SMS-Magic integrate with your company's CRM to help build your database and paint a more useful picture of all your leads and buyers.

Every time a text is sent, the content in the message is recorded in the CRM. This not only builds a record of your conversations, it provides accurate data about the client—the area they're shopping in, price range, type and size of house, whether or not they're first time buyers—and this allows you to precisely and effortlessly tailor communications with them that help make the sale.

## SMS-Magic Makes it Happen

Companies that use text messaging to create conversations with buyers convert 40% more sales than those who don't. The changing face of communications is being driven by the next generation of home buyers that make up the majority of your base. To stay connected with them, you have to use the right technology.

Using new technology can be daunting, but SMS-Magic makes it easy to start using conversational text messaging to communicate with digital-age buyers. To see how it works, text "DEMO" with the following details "NAME, COMPANY, EMAIL" to 36343 or [click here to set up a personalized demo](#).



[1] <https://www.zillow.com/research/zillow-group-report-2016-13279/#buyer>

[2] [https://www.sms-magic.com/wp-content/uploads/files/Messaging\\_](https://www.sms-magic.com/wp-content/uploads/files/Messaging_Course_Docs/2-Beginners-Guide-Compliance-Best-Practices-Conversational-Messaging.pdf)

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[3] <https://www.car.org/marketdata/surveys/buyer/>

## About SMS-Magic

SMS-Magic is a proven, global messaging platform for Salesforce, with over 1500 clients across 190 countries, including small, midsize, and enterprise accounts. SMS-Magic enables Salesforce users to engage buyers and win and retain more new customer revenue, while creating strong customer relationships that drive sustainable competitive advantage. SMS-Magic is the most positively reviewed messaging application on Salesforce AppExchange.



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