



Managing Client Expectations

Clients form expectations based on what they know.

When important details are communicated early, clients are better equipped to make decisions, plan campaigns, and understand how the service works. This often leads to smoother communication and a better overall experience.

Many client frustrations can be avoided simply by providing the right information at the right time.

The best time to explain a limitation, requirement, or policy is before it becomes an issue.

Educate Early

Clients should understand how the service works before they begin using it.

Waiting until a client encounters a limitation or additional cost can create unnecessary frustration. By educating clients early, service providers can help prevent misunderstandings and create a more positive working relationship.

Clear communication is one of the simplest and most effective ways to manage expectations.

Information Clients Should Understand Before Their First Campaign

While every business is different, there are several topics that clients should understand before sending their first campaign.

Campaign Submission Process

Clients should understand how campaigns are submitted, approved, and scheduled.

If campaign requests require advance notice, this should be clearly communicated during onboarding.

Monthly Text Limits

Clients should understand how many text messages are included in their package.

This helps them plan campaigns appropriately and avoid unexpected charges.

Additional Usage Charges

If a client exceeds the text volume included in their package, they should understand how additional messages are billed.

Discussing this early helps eliminate surprises later.

MMS Pricing

Many clients are unfamiliar with the difference between SMS and MMS messaging.

If images or multimedia messages carry additional costs, this should be explained before a campaign is created.

Message Length Limitations

Clients should understand any character limitations that may affect message creation.

This helps create realistic expectations when writing campaigns.

Emoji Limitations

Certain symbols, emojis, or special characters may affect message delivery or increase costs.

Providing guidance early can help clients avoid unexpected issues.

Compliance Requirements

Clients should understand that text marketing is governed by industry regulations and compliance requirements.

These rules exist to protect both businesses and consumers and should be followed consistently.

Reply Management

If replies are monitored, forwarded, or made available through a separate process, clients should understand how replies are handled.

Support Process

Clients should know how to request support, who to contact, and what response times they can reasonably expect.

TIP

Create a Client Welcome Guide that explains the most important aspects of your service and review it during onboarding.

COMMON MISTAKE

Waiting until an issue arises before explaining an important detail.

A client who learns about a policy, fee, or limitation at the moment they need something is more likely to become frustrated than a client who understood it from the beginning.

KEY TAKEAWAY

The best time to explain a limitation, requirement, or policy is before it becomes an issue.