



TEXT MARKETING

Proposal

PREPARED FOR

[Client Business Name]

[Client Contact Name]

PREPARED BY

[Your Company Name]

[Your Name] | [Email] | [Phone]

DATE

[Month Day, Year]

ABOUT THIS EXAMPLE

This is a customizable Academy example. Before sending it to a prospective client, replace the Texta Academy header and footer with your own company branding and adjust the colors as needed. Update every bracketed field, along with the package, pricing, scope, and contact information, for the specific client.

Business Context

Demonstrate that the recommendation is built around what matters to this client.

CURRENT PRIORITY

[Describe the business goal or challenge the client identified as most important.]

BUSINESS IMPACT

[Explain how the challenge affects customer activity, retention, visibility, revenue, or operations.]

DESIRED OUTCOME

[Describe what the client wants to improve and what a worthwhile result would look like.]

RECOMMENDED APPROACH

Based on our conversation, [Your Company Name] recommends a managed text marketing program focused on [primary objective].

The purpose of this recommendation is to help [Client Business Name] communicate more directly with customers and create greater awareness of [promotions, appointments, events, slower periods, launches, or another identified opportunity].

WHY THIS APPROACH FITS

- It is connected to the priority identified during discovery: [priority].
- It creates a permission-based channel for timely customer communication.
- It can support [specific use case] without replacing marketing efforts that are already working.
- It provides a repeatable way to communicate promotions, updates, and opportunities.

INITIAL CAMPAIGN OPPORTUNITIES

- [Campaign opportunity connected to the primary business priority]
- [Campaign opportunity connected to customer retention or repeat visits]
- [Campaign opportunity connected to a promotion, event, launch, or slower period]

Recommended Service

Define exactly what the client receives and how the service will be delivered.

SELECTED PACKAGE

[Package Name]

[\$[Monthly Fee]

[Monthly text allowance] | [Campaign allowance] | [Support level]

per month

INCLUDED SERVICES

- Text marketing account setup
- Subscriber-list and keyword setup
- Campaign scheduling and delivery
- [Defined monthly text allowance]
- [Campaign writing, review, or optimization]
- [Defined number of campaigns]
- [Strategy or planning support]
- Client support through [method]

HOW WE WILL WORK TOGETHER

- 1 Confirm the selected package and complete the service agreement.
- 2 Collect the information needed to set up the account and campaign process.
- 3 Identify the first campaign and confirm promotion details, timing, and approval.
- 4 Schedule and deliver campaigns according to the agreed process.
- 5 Continue planning and communication within the selected package.

OUTSIDE THE SELECTED SCOPE

Additional text usage, additional locations, rush requests, custom materials, or services not listed above may require separate pricing and approval before work begins.

Investment and Next Steps

Make the decision, responsibilities, and next action easy to understand.

INVESTMENT

ITEM	FREQUENCY	INVESTMENT
[Selected Package]	Monthly	\${Amount}
[Setup or onboarding fee]	One time	\${Amount or Waived}
[Approved add-on, if applicable]	[Frequency]	\${Amount}

CLIENT RESPONSIBILITIES

- Provide accurate business, promotion, and offer information.
- Review and approve campaign content when approval is requested.
- Maintain lawful subscriber consent and follow applicable messaging requirements.
- Follow the campaign submission and communication process provided during onboarding.

NEXT STEPS

- Confirm the recommended package and investment.
- Review and sign the separate service agreement.
- Complete onboarding and account setup.
- Begin planning the first campaign.

IMPORTANT

This proposal describes the recommended service and estimated investment. Services begin only after the parties sign a separate service agreement. Specific marketing results are not guaranteed.