

TEXTA ACADEMY | BUSINESS FOUNDATIONS

Selling and Setting Up a New Client

A beginning-to-end workflow for moving a prospective client from the first sales conversation through completed platform setup – whether the client already has a permission-based contact list or needs to build one.

This guide ends at completed setup. Client training, campaign creation and ongoing account management should follow as separate steps.

The complete workflow

1	DISCOVER	Understand the business, audience and goal.
2	PROPOSE	Recommend the right service and define the setup.
3	SIGN UP	Collect agreement, payment and business details.
4	BUILD	Create the account and connect the phone number.
5	PREPARE	Import an approved list or create list-building tools.

Before the first conversation

Know the service packages and pricing you are prepared to offer.

Be ready to explain what the platform helps a business do in plain language.

Have your proposal and online signup process ready before speaking with the prospect.

Part 1: Sell the Right Solution

1

Start with the business goal

Ask what the business wants to accomplish. Examples include increasing repeat visits, promoting events, filling appointments, announcing specials or staying connected with existing customers.

2

Understand the audience

Identify who the business wants to reach and how those customers currently interact with the business. Confirm whether the business already has a contact list and how those contacts gave permission to receive text messages.

3

Connect the service to the goal

Explain how a direct, permission-based text list could support the stated goal. Keep the conversation focused on the business outcome rather than platform features.

4

Confirm the correct starting path

Choose the appropriate setup path: Existing List when the client has a permission-based CSV or Excel file, or No List Yet when the client needs tools and a plan to collect subscribers.

Do not promise results. The proposal should define the service and deliverables clearly without guaranteeing revenue, sales or subscriber growth.

Questions the conversation should answer

What does the business want text marketing to help accomplish?

Who is the intended audience?

Does the business already have a list of contacts who agreed to receive texts?

If there is no list, where can the business invite customers to subscribe?

Who will approve campaigns and provide promotions or content?

Part 2: Send a Clear Proposal

After the sales conversation, send a written proposal based on what was discussed. The proposal gives the prospect a clear decision to make and prevents confusion during setup.

- 5 Summarize the client's goal**
 Open with a short summary of what the business wants to accomplish and the audience it wants to reach.
- 6 Recommend the service**
 State the recommended package or service level and explain why it fits the client's current needs.
- 7 Define what is included**
 List the setup work, ongoing service and support included. Specify whether the setup will include an existing-list import or the creation of list-building tools.
- 8 Show pricing and timing**
 State the setup fee, recurring price, billing frequency and estimated setup timeline. Clearly identify anything that would create an additional charge.
- 9 Give one next step**
 Tell the prospect how to accept the proposal. After acceptance, send the link to the online signup form that handles the agreement and payment.

Recommended proposal sections

Business objective	A brief summary of the goal and intended audience.
Recommended service	The package or service being proposed.
Included deliverables	Setup, platform access, list work and ongoing support.
Investment	Setup fee, recurring price and billing schedule.
Timeline	What begins after signup and the expected setup window.
Next step	How to accept and continue to the signup form.

Part 3: Complete Signup and Core Setup

10

Send the online signup form

After the proposal is accepted, send the client the online signup form. The form should collect the signed agreement, payment information and the business details required for setup.

11

Verify the required information

Confirm the business name and address, owner or primary contact, email address, phone number, and industry or business type. Follow up before setup if anything is missing or unclear.

12

Create the platform account

Create the client's account using the approved business and contact information. Confirm that the account is associated with the correct client before continuing.

13

Purchase and connect the phone number

Purchase the Twilio number, attach it to the appropriate Messaging Service, and add the number to the client's platform account.

Related Texta Academy guides: Use Buy and Connect a Twilio Phone Number and Add a Twilio Number to Your Platform for the complete screen-by-screen instructions.

Core setup checkpoint

Agreement and payment are complete.

Required business and contact information has been verified.

The platform account has been created.

The Twilio phone number has been purchased and connected.

The phone number appears correctly in the client's platform account.

Part 4A: Client Has an Existing List

14

Request the list

Ask the client to send the contact list as a CSV or Excel file. Do not request or accept purchased, rented, scraped or shared lists.

15

Confirm permission

Before importing, confirm that the contacts gave permission to receive text messages from this specific business. An existing customer list is not automatically a text-message opt-in list.

16

Review the file

Confirm that the file opens correctly and includes the phone-number information required by the platform. Resolve obvious file problems before importing.

17

Import the list

Import the approved file into the correct client account. Check the import results and confirm that the contacts appear in the subscriber area.

Setup is complete when: The platform account and phone number are active, and the approved contact list has been successfully imported.

Existing-list checklist

The file is CSV or Excel.

The client confirmed permission to text the contacts.

The list belongs to the business being set up.

The file was imported into the correct client account.

The imported contacts appear in the platform.

Part 4B: Client Has No List Yet

A client without a list should finish setup with practical, permission-based ways to begin collecting subscribers. Do not delay account setup simply because the business is starting from zero.

14

Create a keyword and automatic reply

Choose a keyword that is simple, relevant and easy to spell. Configure the automatic reply so new subscribers know they joined the business's text list and understand what to expect.

15

Create a signup form or landing page

Set up a clear online signup option that identifies the business, explains what the subscriber is joining and includes the required consent language.

16

Create a QR code

Create a QR code that sends customers directly to the signup form or approved opt-in destination. Test the code before giving it to the client.

17

Identify collection opportunities

Show the client where the keyword, QR code and signup link can be promoted: checkout areas, printed materials, receipts, events, social profiles, websites and in-store signage.

18

Provide promotion guidance

Give the client clear wording that explains the benefit of joining. The offer should match what subscribers will actually receive and should never hide that the customer is joining a text list.

Setup is complete when: The platform account and phone number are active, and the keyword, automatic reply, signup form or landing page, QR code and initial promotion plan are ready to use.

No-list setup checklist

Keyword is active and tested.

Automatic reply is correct.

Signup form or landing page is published and tested.

QR code opens the correct destination.

The client has specific places and opportunities to promote signup.

Final Setup Review

Use this review before marking any new client setup complete.

The proposal was accepted.

The online signup form, agreement and payment are complete.

Business and contact information has been verified.

The platform account has been created.

The Twilio phone number has been purchased and connected.

The phone number is active in the correct platform account.

Existing-list path: permission was confirmed and the list was imported.

No-list path: keyword, automatic reply, signup page, QR code and promotion plan are ready.

What comes next

Once setup is complete, move the client into onboarding and training. Show the client how the service will be used, establish who will provide or approve campaign content, and define the ongoing support process.

Keep the two paths separate. A client with an approved list is ready for subscriber review and campaign planning. A client without a list should begin by promoting the opt-in tools and collecting subscribers before sending marketing campaigns.

Related Texta Academy resources

- Text Messaging Compliance: What Every Business Must Know
- Buy and Connect a Twilio Phone Number
- Add a Twilio Number to Your Platform
- Keywords
- Create a Campaign