

BUSINESS OWNER'S SOP MANUAL FOR SMS TEXT-MARKETING



# VIPCustomer

STANDARD OPERATING  
PROCEDURES



TEXT-MESSAGE CAMPAIGNS

By Rasheed Wazeralie Founder of VIPCustomers A Product of Wazerly LLC

# BUSINESS OWNER'S SOP MANUAL FOR SMS TEXT- MARKETING



## HOW TO RUN YOUR MOST PROFITABLE SMS TEXT MESSAGE MARKETING CAMPAIGN

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VIPCUSTOMERS - A PRODUCT OF WAZERLY LLC

# TABLE OF CONTENT

Introduction .....	4
Overview .....	5
What we will cover .....	5
What are the Benefits of SMS Text Marketing? .....	6
A High-Level Overview of Successful Text-Marketing .....	7
The Key Elements of SMS Text-Marketing .....	8
Text-Marketing Tips .....	9
The Marketing Timeline - Results Expectancy.....	10
Responsibilities for a successful SMS Text-Marketing Campaign .....	11
Manager/Owner Responsibilities .....	11
Consultant Responsibilities .....	12
Trainer Responsibilities .....	13
Associates Responsibilities .....	14
List-Building Best Practices (internal and external) .....	15
Structuring Offers .....	16
Running Your Offers, and Offer Logistics .....	21
Healthy campaign Logistics .....	22
Campaign Alarms .....	23
Tracking Your Results .....	24
Summary .....	26
How To Contact Us .....	27



# INTRODUCTION

Congratulations on starting your mobile marketing campaign!

Marketing is most effective where the attention is, and mobile is that attention platform in today's age.

You made a smart decision in choosing this form of advertising as part of your business growth strategy. This document serves to provide you with best practices, and a standard operating procedure to best help you yield the most effective results in your mobile marketing efforts.

Before we start, it's important to realize that you have invested time and money into this form of marketing, and it's important to get your program started correctly. The overall goal is to improve foot traffic, sales, and customer retention. It is not uncommon to see a 30% increase in business when properly leveraging this form of marketing to maximize your results from mobile marketing,

Make sure to follow every step throughout this document, because if the recommended best practices are not followed, then the results of your mobile marketing campaigns will be significantly less effective, and subject to a failure to attain your goals.

# OVERVIEW

of this SOP Manual

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“  
*what we will cover -  
in this SOP*”

- Benefits of SMS Text-Marketing
- A High-Level Overview of Successful Text-Marketing
- Elements of SMS Text-Marketing
- Text Marketing tips
- Timeline expectancy of business growth
- Business owner/Manager responsibilities
- Consultant responsibilities
- Associate responsibilities
- List building best practices (Internal & External)
- Structuring Offers best practices
- Running offers best practices
- Logistics of designated offer best practices
- Healthy campaign logistics
- Campaign Tracking



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# ***What are the Benefits of SMS Text Marketing?***

***REAL-TIME LIVE MARKETING:*** Print advertisement can take days or weeks to get people into your establishment. But with SMS Text-Marketing, you will now have the ability to think of campaigns in the morning and have customers coming into your door within hours. No other form of marketing can accomplish this type of ‘instant results.’

***CASH MACHINE:*** Properly building a mobile campaign is like having a cash machine that allows you to create a business on demand. This is first accomplished by building a database of your existing customers and then consistently marketing to these customers.

***MIND READER MARKETING:*** You will now be able to capitalize on effectively marketing to your customers based on predictive behaviors meaning, what do people think of at 5’oclock when getting off work? Food, of course. In addition, you will have the ability to market to your customers with campaigns centered around city events, holidays, weather, etc.

***FREQUENCY ENHANCER:*** SMS Text-Marketing allows you to communicate and market directly to your customers with the intent of increasing customer frequency. You will now have the ability to craft marketing messages that result in additional customer visits to your establishment. And increased customer frequency means greater foot traffic and sales.

***ASSET:*** If you’ve noticed, every core benefit of SMS Text-Marketing revolves around building a ‘buyers’ database. Having a list of your customers is one of the most beneficial assets you can build for your business. Long-term, if you ever wish to sell your establishment, having a customer database will increase the valuation of your business.

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# ***A High-Level Overview of Successful Text-Marketing***

It's important to outline the sequential process you will follow in building a successful mobile marketing campaign. By following every step, your program can yield optimal results for your business.

Each area will be discussed in detail throughout this manual, but here is the thousand-foot view:

***TRAIN:*** Associates will be properly trained on how to effectively endorse your SMS text marketing campaign.

***LIST BUILDING:*** We will build a list of customers through strategic steps.

***PROMOTE:*** Once your customer list is built, we will start marketing to your audience.

***TRACK:*** It's important to specifically track every offer and its results, to maximize and improve your marketing for greater results.

***CREATE BUSINESS ON-DEMAND:*** Your SMS program is now a beneficial asset to your business. You now have the ability to create an additional business at will based on the strategic steps you have implemented.

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# *The Key Elements of SMS Text-Marketing*

Three key elements of text marketing are The customer, the business, and the staff.

**THE CUSTOMER:** Every marketing effort should benefit the customer. If the offer benefits the customer, then you will get additional business which results in additional sales; but these results only happen when successfully marketing to the customer.

***Always ask yourself:***

“Does this offer get me excited?”

“Would this offer make me enter the business?”

“Do I see immense value in this offer?”

If you cannot answer “yes” to the above three questions for any offer/promotion you run, then the offer needs to be refined.

**THE BUSINESS:** Obviously your overall goal in marketing to your customers is to increase business, but here are a couple of questions you must ask before running a marketing message:

“What is my goal? More people? Moving items? Focused selling?

Promotions? Increasing ticket average?

“Who is the audience I’m targeting?”

Just like any list, your customer list will take on its own personality. From constant testing and tracking, you will discover what deals they respond to best. Knowing your list demographics is also vital. For instance, if you have a list comprised of more families than singles, then sending offers for 25% off all drinks may not be ideal. Knowing your customer audience is key to crafting great offers.

**THE STAFF:** Your associates hold a vital role in the success or failure of your marketing campaign. They interact, communicate, and understand the needs of your customers. Make sure to include their input when crafting offers for your customers. Point out to your staff where their own self-interest lies. More customers, more often, and larger tickets generally means more money for them, so make sure to get your staff involved in your marketing efforts.



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# ***Text-Marketing Tips***

In this brief section, we will cover the do's and don't's of your mobile marketing campaigns. The top two are as follows:

***FREQUENCY:*** Just as sending too many offers to your audience will lower your campaign results, sending too few messages will accomplish the undesirable result of low redemption rates.

So how much is too much? Text marketing is still relatively new and text is still considered an intimate space (more so than email). As this form of marketing becomes more mainstream and universal, the accepted amount before annoyance will also increase; for now, here is a good guideline:

Once per month is too little;

Once per day is too much;

Once to twice per week is a good amount.

As with any audience, it is situation-dependent. You may find that sending more frequent messages is desirable. A good way to gauge this is by tracking un-subscribes to your list. Test sending frequent offers and the responses to those offers (people coming in the door) versus the response rate of sending less frequent offers.

As you start to market to your audience, you will find the list takes on its own personality, meaning that they will react and respond to certain types of deals. The best way is to test, test, and test some more!

***BORING OFFERS:*** Make sure to only send exciting offers. Send offers that make people want to tell others. Every text should be like an amazing gift. Remember that boring offers result in lower redemption rates.

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# ***The Marketing Timeline – Results Expectancy***

Before you can determine the ‘type’ of audience you have, and before you can effectively track text-message redemption rates, you must first build a customer list.

After the associates are properly trained, they can assist in helping to build your customer list. A general guideline in list building is to acquire at least 50% of your customers on a database in 30-45 days, and within 45-90 days your target should be approximately 75% of your customers on a database.

75% is an attainable and realistic goal because not everyone will want to be part of your VIP rewards club. Ideally, your goal should be as close as possible to 100% of the customers on your list because these are the people that know you, like you, and trust your business.

And why would they not want to be part of an exclusive VIP club?

So, the rules of thumb summarized --

- 30-45 days 50% of customers on your database
- 45-90 days 75% of customers on your database

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# ***Responsibilities for a Successful SMS Text-Marketing Campaign***

Just as you are responsible for the success and failure of your business, you are also in charge of facilitating your mobile marketing program. You dictate the awareness and visibility of your campaign, and it's your job to consistently convey this information to your associates.

The beginning phase of starting your campaign is vital to the success of your marketing campaign. Additionally, everyone has a specific role in optimizing the success of your marketing. For example --

## **Manager/Owner Responsibilities**

You are responsible for driving your mobile program. If your list is not growing, then it's an indication that your associates are not promoting the program correctly, if promoting at all. If you do not bring awareness to such potential issues, then you're allowing your program to fail. To ensure success, here are the key areas on which to focus in driving this program:

***YOUR BACKING:*** You must remind your workers of the mobile club daily before shift start. Make sure they are consistently promoting the VIP club because this will serve as your asset when you need to drive and increase business.

***PROMOTION GOAL:*** Set a date in mind to accomplish your target subscriber numbers as outlined above. Set this date and promote it frequently to your associates.

***OBSERVE:*** Observe your workers as they interact with customers about this promotion. Make sure they are promoting this with integrity and educating the customer to ease the skepticism the customer may have about joining such a program. With every customer, they should speak about the mobile campaign with the intention of helping the customer to join the VIP list.

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**CONSTANT AWARENESS:** This is your asset to create a business on demand. Constant attention and awareness to the VIP club will set an expectation with your associates that will allow them to speak about the program habitually.

**ASSOCIATES BENEFIT:** Depending on the type of business, generally more customers mean more tips. Make certain to convey this core benefit of building a customer list to your associates.

Consider having contests with the associates to help increase subscriber count. By making list-building fun, you allow your associates to generate better results in less time. You will also get better participation by offering a prize for the most opt-ins, etc.

## Consultant Responsibilities

Your mobile consultant also holds an important role in the success of your campaign. In addition to training the associates on best practices, it's his job to help you optimize marketing messages, provide campaign metrics and analytics, and structure the initial offer to jump-start your text-marketing campaign.

**ASSOCIATE TRAINING:** This is ABSOLUTELY the most important component of your mobile rewards VIP club! Training is the glue that holds a campaign together.

Associates are the lifeblood of the text program; they are the people that interact the most with customers, therefore they need to know how to properly explain the campaign in a way that is not intrusive. Associates are the first responders who will diffuse any skepticism and answer any questions that concerned customers will have.

You will also find your subscriber rate will be significantly higher with proper training and associate participation than without. Below is an overview training guideline your mobile consultant will follow. Make sure to read this section as well so you will know how to coach your associates.

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## ***Trainer Responsibilities***

To properly educate associates about the Mobile Rewards VIP club. The overall goal is to best help associates explain the mobile VIP club in a professional manner.

A few areas associates need to know --

- How to subscribe
- What the mobile VIP club is all about
- Diffusing skepticism
- Suggested sayings:
  - “Are you an exclusive VIP member yet?”
  - “Have you heard about our VIP club?”
  - “Have you already signed up?”
  - “Do you like saving money and getting special discounts?”

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## Associate Responsibilities

Your associates dictate the success or failure of your mobile campaign. It's important you enforce and coach accordingly to ensure the best success. Here are their responsibilities you should always touch on and observe, especially in the beginning phases of your SMS campaign:

Does your associate talk about the mobile VIP program in every interaction with customers?

Does your associate educate the customer about the mobile VIP program in a welcoming manner that does not cause alarm?

Does your associate help customers join the program if they are confused about how to join?

Does your associate understand how to properly diffuse skepticism such as telling the customers: "You can opt-out at any time by texting stop. This program is completely safe as your information will not be shared or sold; This is an exclusive club to show appreciation for all our valued customers."

Does your associate speak about your program as an exclusive club that is only for valued special customers? If not, they should speak about the VIP club in this manner to increase subscriber count.

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# ***List-Building Best Practices (internal and external)***

Growing your database will occur in two phases: internal and external.

The first phase is to build an internal database of your current customers because you will obtain the biggest redemption rates from these patrons when running offers compared to building an external list. This is true because your internal customers are your ‘regulars.’ These are the people that know you, like you, and trust you.

External list building revolves around generating a database by leveraging any outside marketing you’re doing. Overall response rates will be lower because these ‘outside’ subscribers are typically not your regulars. However, they are worth collecting because in general, the larger your list, the greater your results.

The best way to grow a quick internal list is to provide a reason for your customers to join your list. The best incentive is to gift your customers immediately. For example, a Free drink, Free dessert, or 15% of their meal is a good immediate offer to give in return for joining your VIP club. Your mobile consultant will help you craft an offer that generates the best response.

Next, let’s focus on the external list.

Do you engage in any outside marketing? Such as magazines, billboards, social media marketing, newspapers, or radio? If so, make sure to build a list leveraging these current marketing platforms by providing a text number different from your internal database text number. The reason behind this is tracking where your response is coming from. Again, your mobile consultant can help you with this.

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# Structuring Offers

In this section we will cover the different types of text offers to run for your business.

The examples listed are for restaurants, but the thought process and premise you should have behind every text is to ask yourself “what is my goal?.”

Not every offer is the same and your intention should dictate the type of promotion to run. A common mistake several businesses make when engaging in SMS Text-Marketing is treating all offers the same. In fact, certain deals appeal to different audiences, and the business may be comprised of multiple audiences. It’s important to properly target your messages to the desired group in accordance with your goal. Here are multiple types of offers with examples of what the offer would look like based on the offer type:

1. SAVE MORE TEXT - show this text for % off any combo
  - Get \$3 off your total bill with the purchase of a BBQ plate
  - Take \$5 off any plate with the purchase of an additional plate
2. SPEND MORE TEXT - Reward purchase over {larger than average purchase}
  - Show this txt for \$\_\_\_ gift card when you spend more than \$\_\_\_ on dinner
  - Free dessert & side with purchase over \$20
  - \$15 worth of food for only \$9
  - \$\_\_\_ off when you purchase any menu plate
3. GET MORE - one free hamburger when you purchase two
  - Buy 1 smoked chicken sandwich get 1 free
  - Free dessert & side with the purchase of any plate
  - Buy 2 plates get 2 FREE desserts



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# Structuring Offers - Continues

4. EXCLUSIVE DEALS - Tuesday only special. Free dessert when you say the secret word of the day {insert secret word}  
Free side of fries with any sandwich when you say the word 'food'  
Today only brisket and ribs 1/2 off!  
Pssst! This week's VIP SPECIAL ... {special deal}
5. VIRAL TEXT - forward to a friend  
Free dessert with any plate. Show this text to 5 friends and show us the message,  
you also get your drink free!  
Forward the {special of the day} to 5 friends and show us the text, get a FREE  
dessert & extra side with your next meal, or simply: Today's Special is XYZ. Forward this to your friends!
6. ALL-INCLUSIVE - get this, that, and more for \$\_\_\_  
Get any sandwich, side, & drink for \$5. Today only  
Family meal-get 3 desserts, 3 sides, a gallon of iced tea, a whole rack of ribs for \$30
7. TRAFFIC-DRIVER OFFERS - come in between 5-8pm & get \_\_\_\_\_{special offer}  
Come in between 5-8 pm to get your entire order 40% off  
Bring a friend or family member between 12-8 pm & get 2 drinks FREE w/ the purchase of an entree
8. PREDICTIVE TEXT - because of {local event, weather, special day} you need {your offer}  
Beat the heat! come cool off with a FREE iced tea on the house  
BBQ picnic day. get a bbq dinner meal for only \$25. Includes dessert, a gallon of tea, 3 sides, & meat. Today only Off work special - get \$20 worth of spend for \$15 worth of food. Minimum purchase \$15

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# Structuring Offers - Continues

9. CUSTOMER APPRECIATION - because we love ya' we are doing {special offer}

Tonight only. All you can eat BBQ! Only \$10.99. Show text to claim offer Buy 1 {something} gets 1 Free! Today only. Show text to claim offer Summer cookout! Come hang out with us. \$10 admission per person. Kids \$5 per head. Music, games, food, fun!

10. EVENT BUILD UP - send a text to promote a big event  
Restaurant cookout Restaurant bbq eating challenge  
Customer appreciation days Predictive marketing days, when you know a special event is coming up such as Fathers Day, Memorial Day. Send a text to remind them

11. CONTEST

Text to win Tuesday! 1 out 25 winners will win FREE lunch today. Play now! You've won the Free Burrito! Show this text to collect.

12. EXPIRATION TEXT

Labor Day Weekend Special, good till {DATE}  
Back to School Special, \$XYZ off the first week in September only

13. LET'S HAVE FUN SECRET WORD (OR SECRET ACTION)

Say "Coffee Brake Rules!" to get a free donut with a coffee order  
Say "I Love Brad Pitt!" to get 50% off coffee order Today Only  
Say "Bingo! Bingo!" to win free scratcher all this week  
Or: Sunday Funday! Wear mismatched socks today only, show socks and text to get (XYZ) Wild Wednesday: Walk-in, proclaim loudly "I Love BEER!" and show the text (and ID) for 50-cent beer today only.

14. SECRET SPECIAL

Secret deal only for VIP members (The deal can be any of the above types) COFFEEBRAKE secret special – get express mocha large for 50cents off! Pssst! BURGERMAX secret special – three burgers for the price of two! Ask to see the Secret Blackboard Special. Pass it on.

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# **Structuring Offers - Continues**

## 15. DRAWINGS

X-number of winners: Every 7th person gets coffee free! (must have a special system that allows for this special programming)  
Alphabet winners: If your name begins with the letter "J" free coffee! Guess the Secret Number (1-9) and get X% or \$X off!

## 16. SLOW-DAY SURPRISE / SLOW-TIME SURPRISE

Today only - two for one cappuccino (order-booster better than a discount) For the next two hours, till 5 pm -- Get a latte, have a donut for free!

## 17. LOYALTY-CARD BONUS

Got our Loyalty Card? Triple-Stamps today only!  
Get a Loyalty Card today and get five stamps today only!

## 18. HELP US TEST

Market research on new items Test both our new appetizers, fill out a survey, for the price of one. Special deal & price, and limited availability (use this to test customer acceptance of a possible new item; buy small quantity, offer only via text, get customer feedback. No need to reprint menus till it's a winner!)

## 19. BIGGER TABLE (if avg table=2 customers, make the deal for 3 or 4 at a table)

Table of 4 gets (dessert, discount)  
Birthday - your dinner free when bringing 5 guests

## 20. SELL A GIFT CARD, LOYALTY CARD, OR GIFT CERTIFICATE (somewhat viral)

Signup here to win Gift Cert  
Give a gift card to a friend; get equal-value  
Double-Stamp Wednesday (on a slow day, get a double stamp on loyalty card) Bring a friend to get a loyalty card, get yours stamped triple with order

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# **Structuring Offers - Continues**

## 21. FREE UPGRADE

- a. COFFEEBRAKE all weekend – Buy small Cappucino, get Large!
  - b. Or: COFFEEBRAKE this week – Get a Large Cappucino for the price of a Small!
- (Note: The same deal, stated differently, may have very different results.)

## 22. FUNDRAISER WITH LOCAL ORGANIZATION (school, fire-fighters, Xmas-food)

Requires coordination with a local organization (rotary, school, etc)

They use the children/members to sell tickets

Tickets provide free (food, discounts, discount card) or a contest to win Use webform/phonecall enlistment to capture them (for webforms, special software is usually required)

## 23. ALTRUISTIC MESSAGES

Now and then you may wish to send a fun, inspirational, or helpful message which contains no selling at all (or that presages an upcoming deal) Coming this Friday, the [Your Town] Artwalk. Get Artsy! Come see us! Coming Friday, the Boomtown Rodeo. Yee-haw! (and watch for a special deal)Next week, the US Marine Corps Food-for-Tots program. Smartphone? Tap [weblink goes here] for more info.

## 24. CO-OP MARKETING WITH OTHER MERCHANTS

Why not strike a deal with a compatible merchant, and send traffic to each other?

STEAKHOUSE friend Thomas Jewelers has special Valentines' pricing, good till next week only, for Steakhouse customers. Show text for secret deals. (And in return, Thomas Jewelers will broadcast text to their client about your Valentines Dinner-for-Two deal ... or ... If Thomas Jewelers has no text, get him to hand out a printed coupon to every one of his customers, telling them to come into the Steakhouse and sign up for the special text deals there.

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# ***Running Your Offers, and Offer Logistics***

In this section, we will quickly go over structuring your messages, proper send frequency, ideal send times, and the psychology to maximize customer redemption from your text messages sent out. When crafting messages, to get the best response it's important to follow the following criteria:

- Address your business name in all caps as a header: ex) BOBS PIZZA
- To start generating consistency, send messages at the same time of the day
- Send at least 3-4 offers monthly for consistency
- Always include scarcity in messages: "today only, limited-time" (or add expire date: GOOD THRU SAT 3/9, VOID AFTER SUN 3/10 )
- Use no unnecessary verbiage in the text message.
- Address at the bottom if needed (usually, it isn't)
- Put the offer first

Once your list is built to a marketable level, you will initially send out 'random' text to your audience for increased business growth. This is perfectly fine; however, you may want to evolve your campaign and start to streamline your traffic, your management of the process, and customer sales by establishing designated deal days.

A designated deal day is a special day of the week that your customers will know is the special offer day. This is not necessary, but worth considering as your marketing campaign evolves. It's a solid way to create predictable sales.

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# ***Healthy Campaign Logistics***

In this section, we will discuss the logistics of a healthy marketing campaign, plus campaign red flags and common alarms.

The key performance indicators on which you will base a healthy campaign are: “Time and average customer count.”

As stated, you should have at least 75% of your customers in a database within a 90 day period; at least 50% of your customers on a database within a 30-45 day period.

The only way you can properly gauge this metric is by knowing your average monthly customers. But if you do not know this number, a good rule of thumb is to use 50% of your weekly transactions as weekly unique customers. (Taking 50% of transactions is a conservative number that accounts for multiple customer visits.)

For example, let’s say you have 500 transactions per week. This means you have around 250 unique customers per week and around 1000 customers per month walking into your establishment. Using the above metric as a guideline, within 30-45 days you should have a database of 500 customers (50% of customers) and a database of 750 subscribers within a 90 day period (75% of customers).

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# ***Campaign Alarms***

If you notice that your baseline numbers are significantly less than 50% of average customers within a 30 day period, then this is a key indicator that your associates are NOT effectively promoting the mobile VIP program.

It's also an indicator that you need to observe and bring more awareness to your associates about your VIP club. DO NOT let your campaign go past 30 days with less than the stated figures, because your campaign is now subject to failure.

If you notice these alarms, make sure to contact your mobile consultant immediately to re-adjust and fix accordingly.

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# ***Tracking Your Results***

This section touches on the effective measurement of your mobile campaign. You can only manage what you measure, so it's important you closely track your campaign efforts.

When tracking your offers to evaluate the effectiveness of an offer, it's important to correctly calculate the true generated revenue by taking the discount into account.

For example, suppose you ran an offer where the customer could get a \$20 large pizza for only \$10, and it ran for one day. During that day, you've kept a careful count of how many customers walked in and claimed the special offer.

At the end of the day, your count shows you sold 50 pizzas. If you'd sold them at full price that would have been \$1000. But we didn't sell them at full price. So to calculate your actual revenue collected, simply consider the discounted price. For example – 50 pizzas sold at \$10 = \$500 true generated revenue.

To keep the most helpful record of your offer's success, make a record of the number sold, the price at which they were sold, and the total generated revenue.

As you try different offers and keep careful records, this close tracking of your offers will allow you to see what offers your audience responds to best and provides constantly improving guidance about how to best market to your audience.

Tracking these redemptions is simple. You can do it two ways: a simple tally system or using your P.O.S. (point-of-sale) system.

If you want to manually track, just get a piece of paper and make a tally mark every time a customer shows the text offer on their phone. Or you can create a special offer button if your P.O.S system allows.



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# ***Tracking Your Results - Continues***

Additionally, make sure to note the date, the time of day when the order was broadcast, and make a note of the list size at the time the offer was sent.

Good tracking will result in more effective future marketing for your business and gives you the best return on your marketing investment.

In summary, track the following:

- The Offer
- The Discount
- The number of people receiving the offer (ie: current list size at the time of offer)
- The Date
- The day of the week (perhaps)
- The time of the day that the offer was sent out
- Redemption count
- Total revenue generated by the offer

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# Summary

Congratulations! You made it through the SMS standard operating procedures manual!

As you can see, running a successful mobile marketing campaign involves detailed attention. To reiterate, make sure your program gets started correctly and closely monitor your key performance indicators for a successful SMS program.

Additionally, your mobile marketing consultant may be able to assist in the responsibilities listed in tracking and optimizing your mobile marketing campaign. Stick closely to the recommended best practice steps listed in this manual to avoid common causes of failure or lowered results.

We wish you the absolute best of success with your mobile VIP club!

- Rasheed Wazeralie  
Owner & Founder of VIPCutomers  
A Product of Wazerly LLC

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## How to Contact Us

The “Business Owner’s SOP Manual for SMS Text-Marketing” has been compiled and produced by VIPCustomers, a product of Wazerly LLC.

If you have questions, or you wish to obtain assistance implementing a maximally profitable SMS Text-Marketing campaign, then please feel free to contact us.

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