

# The SMS Campaign Guide for a Stress-free 2023 Tax Season

Thank you for checking out our webinar on how texting can help you increase your sales, prevent appointment no-shows, get paid on time, and have your easiest tax season ever.

We covered a lot of information over the course of our webinar, so here are the SMS templates we featured for your reference and a review of how to automate them.



SMB OWNERS 142

Total sent  
142



Tax Season Announcement

Success Rate +92%

➔ 130 Responses



## 3 SMS Templates for Tax Preparers

### The Tax Season Announcement

It can be easy to forget to get started on your taxes early. Make sure your clients don't miss this important deadline with a helpful reminder.

Hi [NAME], it's time to file your 2023 taxes!  
Call me at [YOUR NUMBER] or reply YES to this message and we'll set up a time to meet.

### The Appointment Reminder

Missed appointments can mean a lot of missed revenue and wasted hours for your business. Keep your appointments top-of-mind by sending one of these texts a week before a client's appointment, as well as the day before.

Hi [NAME]! Your appointment at [COMPANY NAME] is coming up on the [DATE] at [TIME]. If you need to reschedule or cancel, please reply here or call me at [YOUR NUMBER].

### The Payment Reminder

Don't waste time chasing down late payments. Help customers pay on time by reminding them that their balance is due. You can even attach their invoice as a PDF and include a link to make submitting payment easy and fast.

Hi [NAME], your invoice for your 2023 tax preparation is attached below. Let me know if you have any questions. You can check your balance and submit your payment here: [link]

# How to Set Up Your Text Message Templates

**Note:** The steps below may look a little different, depending on which SMS service you choose, but we'll show you the steps in SimpleTexting's platform.

## STEP #1

### Create your keyword(s)

Once you're logged into your SimpleTexting account, click [Keywords](#) on the left-hand menu, then [New keyword](#), and fill out the fields on the page. Choose [Save keyword](#) when you're done.

## STEP #2

### Set up your autoresponders

From that same left-hand menu, select [Autoresponders](#), then [New autoresponder](#). Fill out the fields, select when your autoresponder will send and which hours and days it will go out, then choose [Save autoresponder](#).

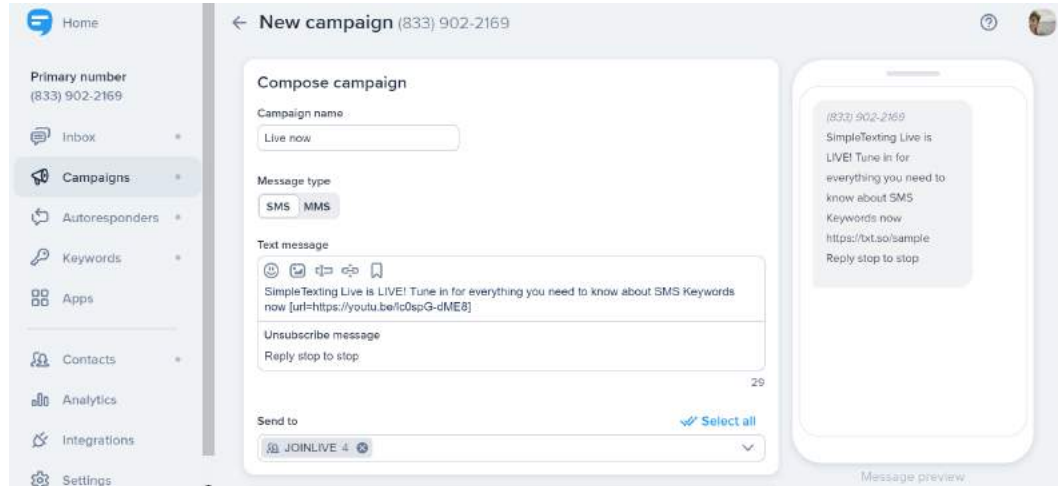
61%

OF CONSUMERS  
WANT THE ABILITY TO  
TEXT BUSINESSES

### STEP #3

## Schedule any upcoming campaigns

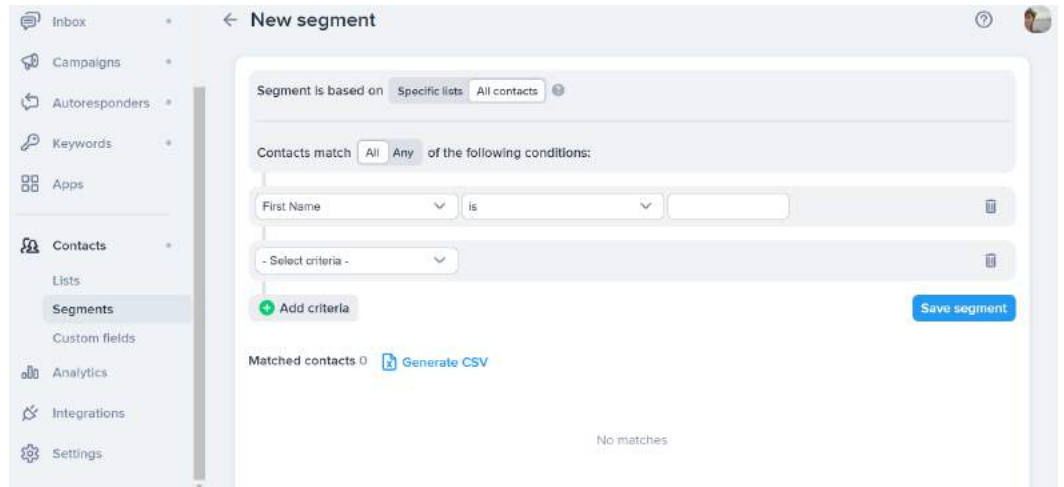
From the left-hand menu, go to **Campaigns**, click **New**, and fill out the fields. To schedule campaigns or set them as recurring, choose **Scheduled** or **Recurring** at the bottom of the page and fill in your scheduling details, then click **Next**.



### STEP #4

## Filter contacts into segments for targeted messaging

Click the **Contacts** tab on the left-hand menu and choose **Segments**, then **New segment**. Select **Add criteria** and choose your custom or default field, then choose **Save segment**.



If you have any questions about the tips we discussed, send me a message at [kyle@simpletexting.net](mailto:kyle@simpletexting.net). You can also sign up for a **free 14-day trial** to see our faster, more affordable SMS marketing platform in action.