PLAYBOOK

Hatch Messaging Best Practices

Hatch

Introduction

Hatch offers several messaging templates within the app, but you are free to modify them to your liking or write your own messages from scratch.

These guidelines will help you to ensure that your messages stay compliant and also create a positive experience for your customers, which ultimately maximizes your response rates and your ROI with Hatch.

Table of contents

Why these best practices?

These message best practices prevent your messages from being burdensome, disruptive, or mistaken as spam. We know that you would never intentionally write a message of this nature, but the fact remains that:

- Robotexts and spam is higher than it's ever been
- This is why spam filters and TCPA compliance are both stricter than ever before.
- Not to mention the fact that consumers are bombarded by marketing content all day long.

Put all of that together, and even the most well-intentioned message can result in a nonresponse, an opt-out, or even a spam filter.

These best practices are designed to not just be compliant, but to create a truly positive customer experience so you can:

- Increase response rates and maximize conversion
- Reduce opt-outs and spam filtering
- Maintain a positive reputation among customers and mobile carriers

We want you to get the most out of Hatch, and this guide will help with that!

Messaging best practices

Follow these best practices to ensure your messages resonate with customers, get responses, and facilitate a positive reputation for your business.

1. Follow TCPA compliance

TCPA compliance enforcement continues to ramp up each year. The full compliance checklist warrants its own resource, which we share below, but the three major requirements to know about related to your messaging content are:

1. Get consent to text your contacts
2. Identify your company name in the first text of every campaign.
3. Include an opt out instruction in the first text of every campaign.
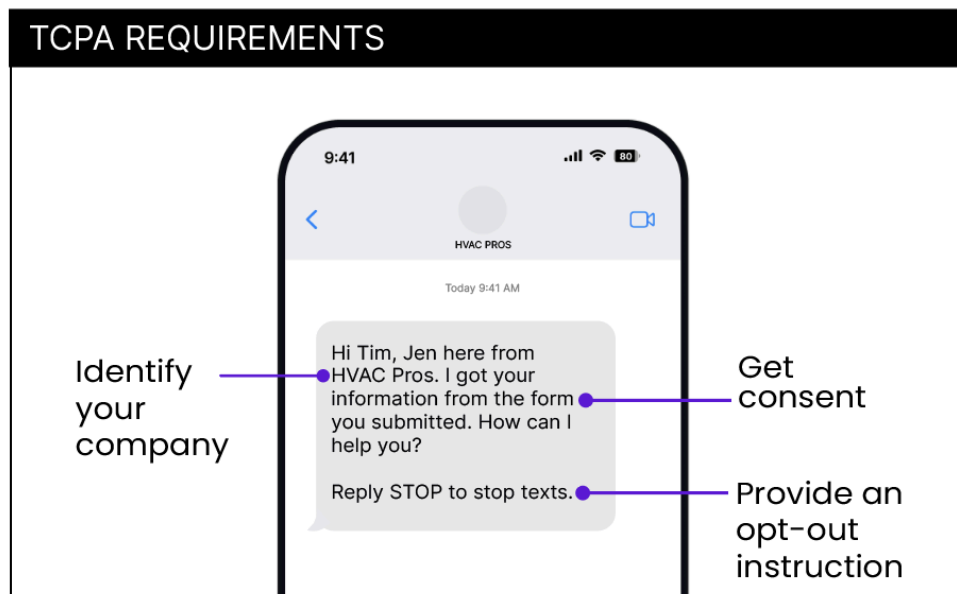
For the full TCPA checklist, with templates, [download our free TCPA compliance checklist here](#).
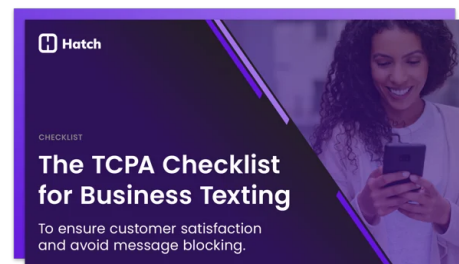
2. Segment and tailor

While Hatch can be used to send out a mass blast to your entire database, we don't encourage it. This is because Hatch is a communication platform, not a marketing platform. It is built for tailored messaging that starts conversations and builds relationships.

As such, the best practice for Hatch is to segment out your audience and create tailored, personalized message sequences (campaigns) for each segment. This will foster engagement, improve conversion, and increase retention. Mass blasts, on the other hand, run the risk of high opt-out rates, spam flagging, and compliance violations.

Here are some audience segment examples:

- New leads
- Recently quoted prospects
- Aged leads who haven't booked an appointment
- Prospects who were quoted a month ago
- Closed lost prospects due to timing
- Canceled appointments
- Customers who have signed but whose project has yet to start
- Customers with recently completed projects
- Customers who have given you a 5 star review
- Customers who have given you a 1 star review

With segments like this, you can create specific offers and messages that resonate and will keep opt-out rates low.

3. Keep it short

The biggest reason SMS open and response rates are high is that people prefer the short, digestible nature of texting. Send them a long message and you can be sure they'll either not respond, or opt out altogether.

So, what does "short" mean?

Keep messages as close to 160 characters as possible. We know that with required compliance verbiage, this isn't always possible, so aim for a maximum of 160-220 characters.

The visual below shows you what different text lengths look like. Put yourself in your customers' shoes. If you wouldn't feel like reading through 360 characters or more, you can bet they won't either.
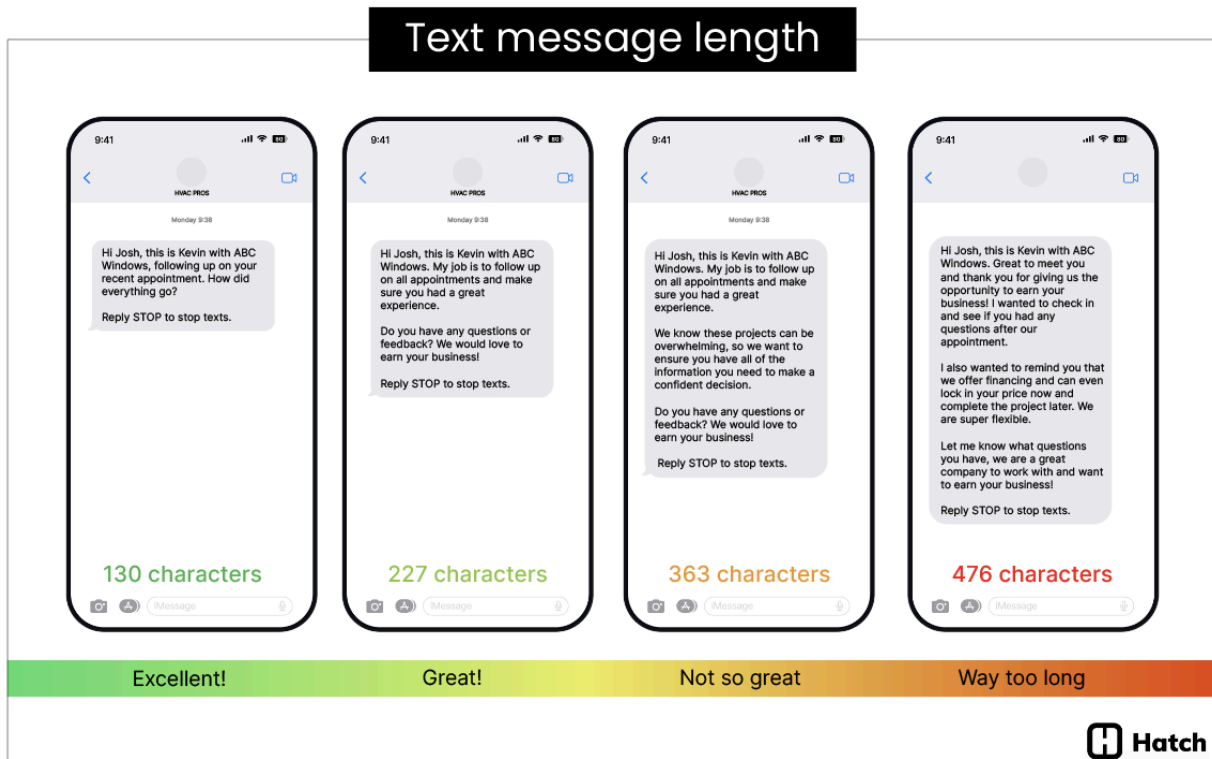
This is the hardest part about SMS marketing! And even email marketing.

But just remember: The goal of your message is not to convince them to buy your product or service. It's simply to get a response. And the best way to do that is to keep your messages short.

How to keep them short

- Ask ChatGPT to condense your message for you.
- Remove extraneous characters like "I'm reaching out to..." or "I was just following up on..."
- If you're including a lot of details, take those out and move them into an email.

4. Think dialogue, not monologue

Your messages should invite a dialogue, rather than being one-sided. Address the recipient by name, share one or two points quickly, and then finish off with a question or call to action to invite a response.
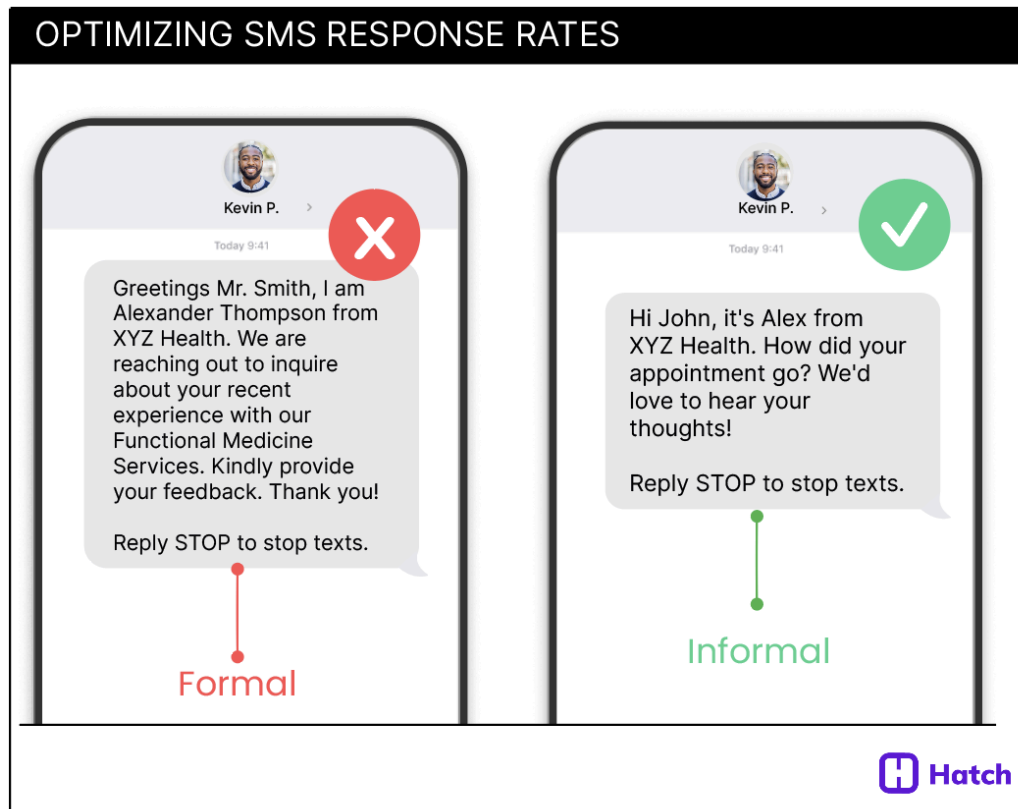
5. Write with conversational language

While it's important to remain professional to earn trust, overly formal messages can sometimes be disengaging, stiff, or appear as spam. Don't use industry jargon or fancy vocabulary, and when introducing yourself, use your first name only. People want to feel like people are texting them, not robots.

OPTIMIZING SMS RESPONSE RATES

Kevin P.
Today 9:41

Greetings Mr. Smith, I am Alexander Thompson from XYZ Health. We are reaching out to inquire about your recent experience with our Functional Medicine Services. Kindly provide your feedback. Thank you!

Reply STOP to stop texts.

Formal

Kevin P.
Today 9:41

Hi John, it's Alex from XYZ Health. How did your appointment go? We'd love to hear your thoughts!

Reply STOP to stop texts.

Informal

Hatch
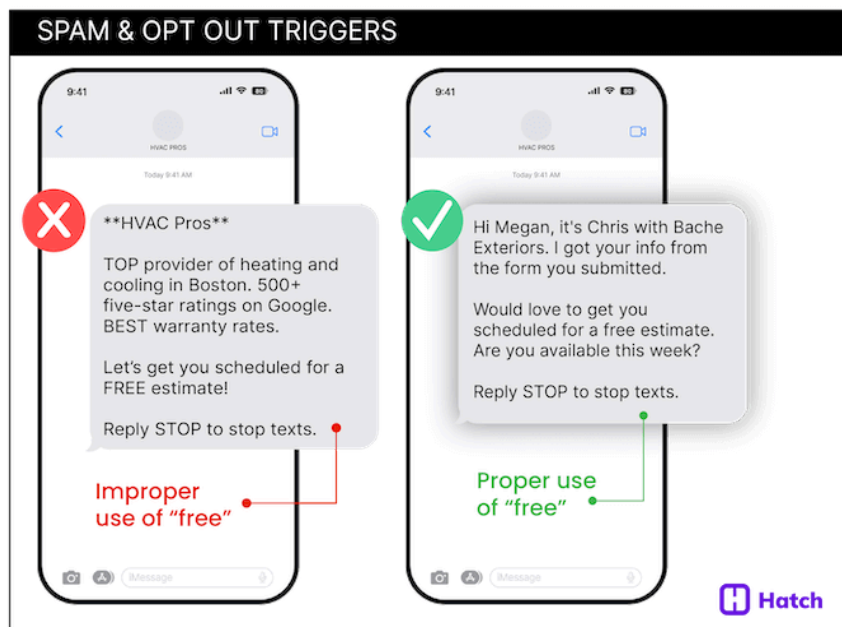
6. Avoid spam trigger words

[Spam trigger words](#) can cause a consumer to mistake your message as spam and ignore it or opt-out, or can cause a carrier to flag or filter out your message entirely.

NOTE: Spam trigger words are not black and white. Whether or not a word gets mistaken by a carrier or customer as spam depends on several factors:

- Your sender reputation (have you been flagged or filtered in the past?)
- Your business reputation
- How well your recipients know you
- The volume of messages you're sending out
- How many other spam triggers are in the message

For example, "free" is considered a spam trigger. Will a personalized, conversational text that says "I'd love to get you scheduled for a free estimate" get flagged as spam? Probably not.

But an impersonal, mass text that says "Book your FREE estimate NOW!" might. In other words, if you do need to use one of the below words (many of our clients offer free estimates or consultations, and money-back guarantees), you should be okay as long as it's in the right context and you follow the messaging best practices in this guide.

Freebie spam trigger words

- Free $$$
- Free preview

- Free access
- Free trial
- Free money

Exaggerated claim spam trigger words

- Risk-free
- 100% satisfied
- 100% free
- 100% more

FOMO spam trigger words

- This won't last
- Take action
- Limited time
- Time-sensitive
- Limited availability
- Short-term offer
- Available for a short period
- Don't delete

Lottery spam trigger words

- You have been selected
- You have been chosen
- Winner
- Exclusive opportunity

Other spam trigger words

- Important information regarding
- Information you requested
- Check or money order (Big no-no. All payments should be done through a secure link.)

If you have questions about using any of the words in your messages, ask your Account Manager and we'll be happy to help. For the full list with alternatives, head to our spam triggers blog post.

7. Don't use all caps

The only word that should be all-caps in your texts is the opt-out instruction in the first message. This is a requirement. Otherwise, do not put anything else in all caps.
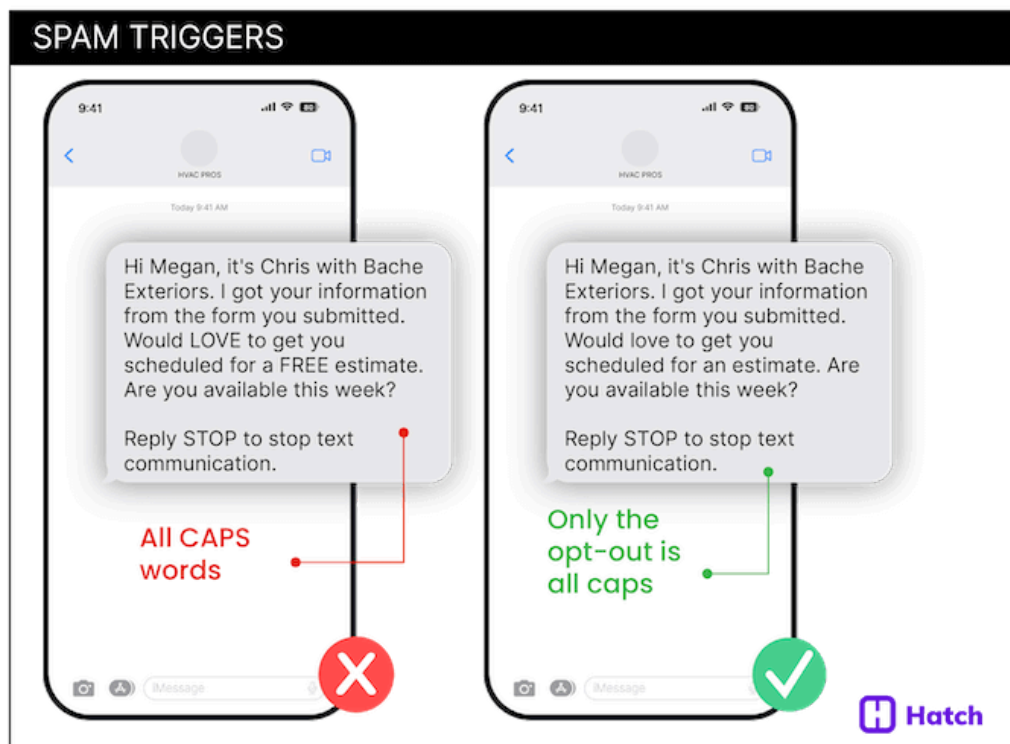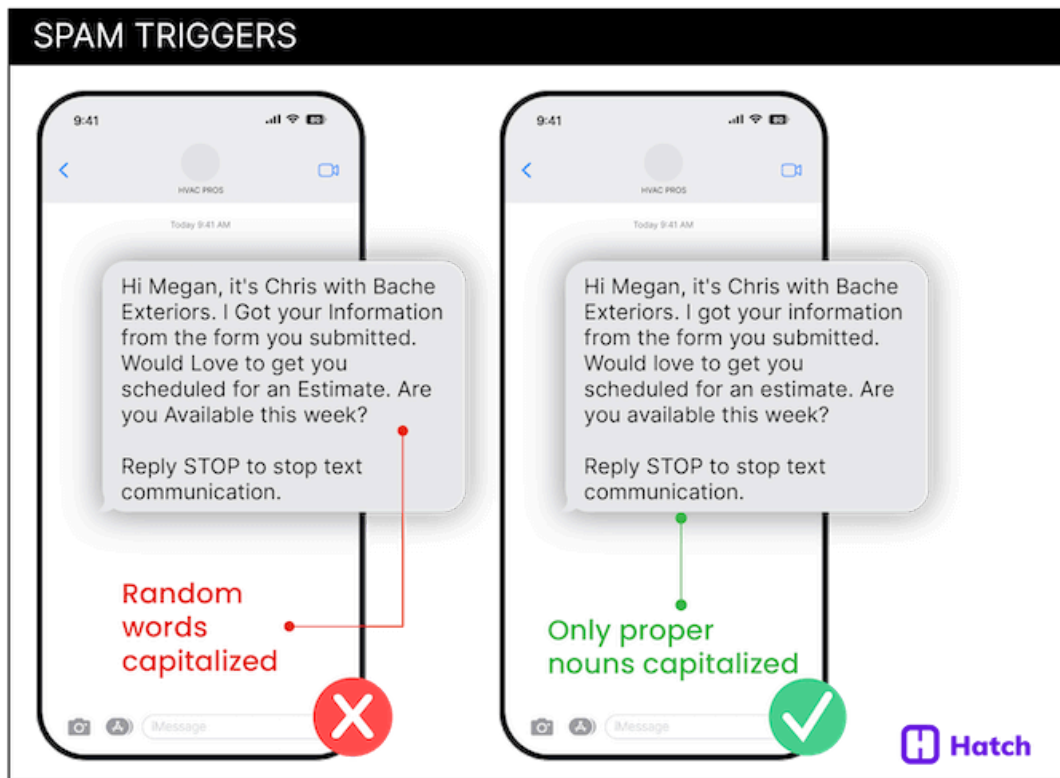
8. Be consistent with capitalization

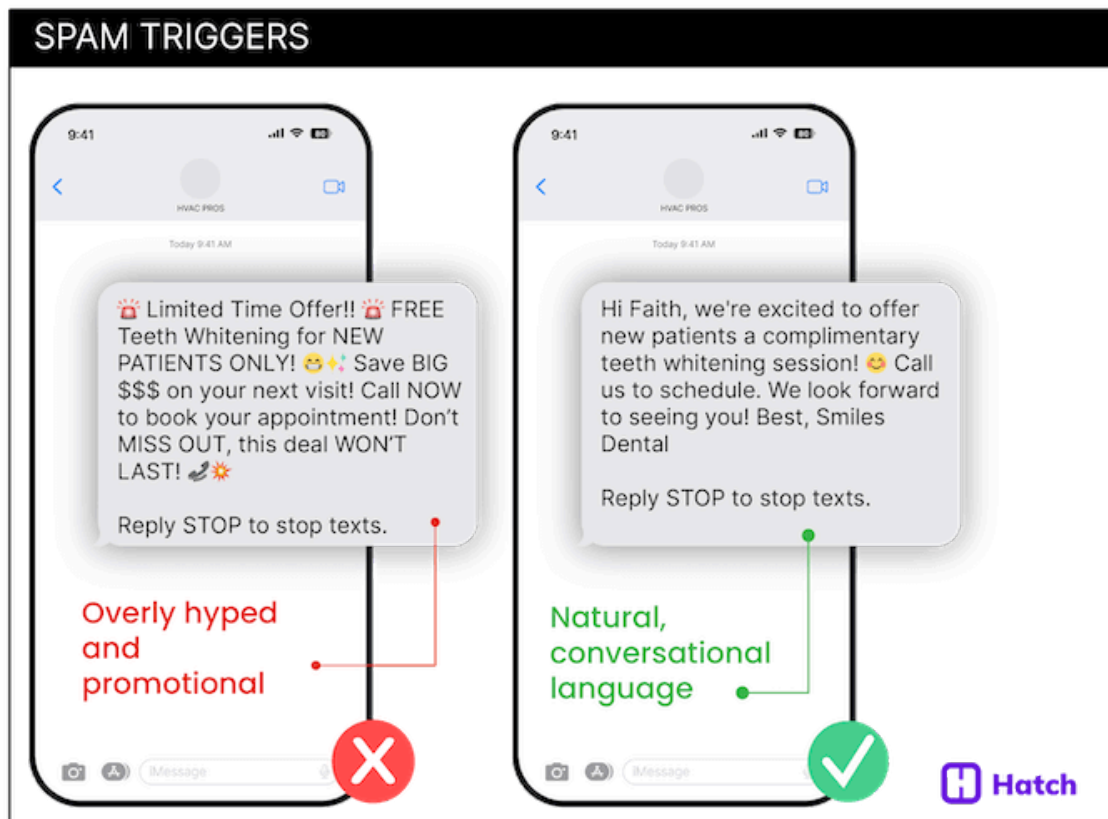Only capitalize proper nouns, and here's a demonstration as to why:

Random capitalization in different Parts of Your Messages disrupts the reading flow, creates confusion, and feels Phishy.

See what we mean?

9. Don't overhype

Emojis and exclamation points add personality and friendliness to your message, but keep it to one, maybe two maximum per message.

10. End with a question or call to action (CTA)

We always tell our customers, "Go for the ask, not the sell." Again, the goal when reaching out, especially over text, is not to convince them of everything about your business and credibility, and to land the sale. It's to get them to respond so you can get the conversation started. And the best way to do that is to end with a clear ask or call to action.
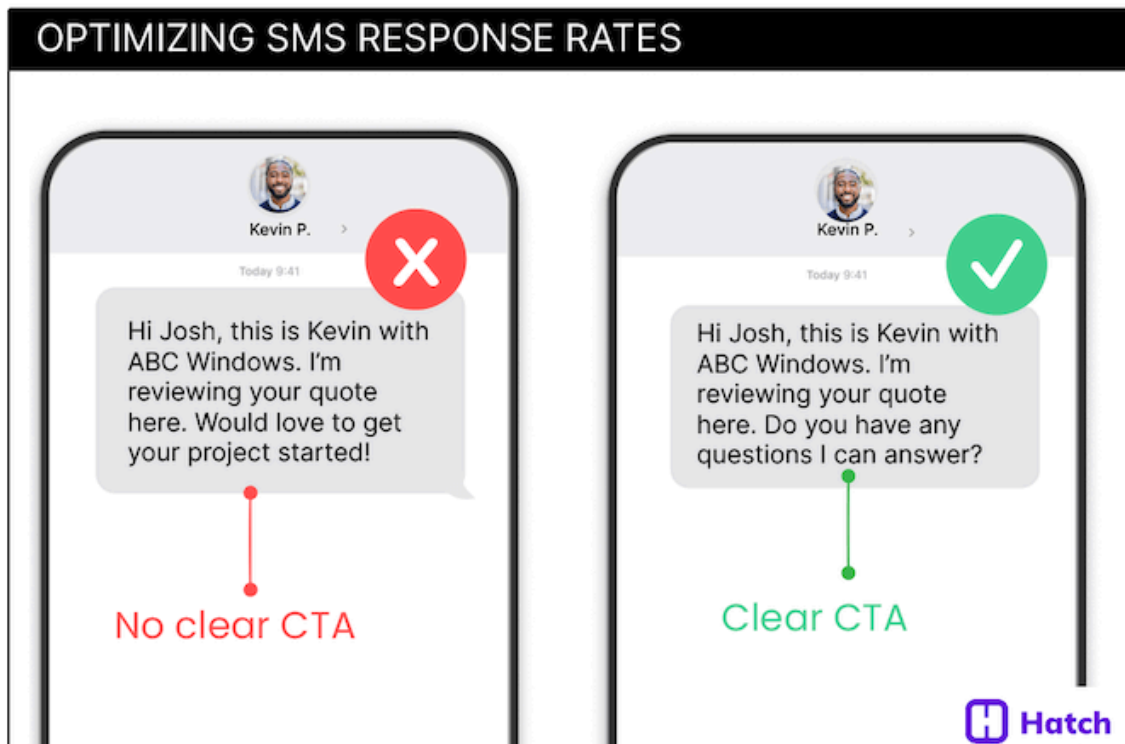
Examples of clear calls to action:

- Text me back with what you're looking for!
- Use this link to schedule your appointment.

- Let me know the status of your project.

Examples of clear asks:

- Do you have any questions?
- Any reason not to move forward?
- Are you available this week for an appointment?

11. Use our resources

We've collected other templates that you can use in addition to the ones we offer within the app. These include:

- Appointment Reminder Templates
- Speed to Lead Templates
- Estimate Follow-Up Templates

We also ran a webinar on Hatch messaging:

- [Recording](#)
- [PDF](#)
- [Recap email](#)

Use these best practices to get the most out of Hatch

As we mentioned, these tips, templates, and best practices are designed to help you:

- Increase response rates
- Decrease opt-out and spam rates
- Improve your reputation
- Ultimately improve conversion and your Hatch ROI

If you need help with your messaging, [click here to reach out to your Account Manager](#). We'll be happy to help!

SMS Messaging Best Practices

When writing a message in Hatch, ask yourself:

☐ Is it compliant?

- Does the first text in the campaign tell the customer how to opt-out and identify the name of the company?
- Did this customer provide consent for my business to text them?

☐ Is it segmented and tailored?

- Is it a conversation starter or is it a mass blast?

☐ Is it short?

- No more than 160-220 characters?

☐ Is it a monologue or a dialogue?

- Is it self-focused or does it pass the baton to the customer?

☐ Is it in conversational language?

- Does it sound like you're talking to a colleague or friend?

☐ Does it have any spam trigger words?

- If so, is the word used in an honest, moderate manner?

☐ Is it free of all-caps words?

- Only the opt-out instruction is capitalized.

☐ Are there any improper capitalizations?
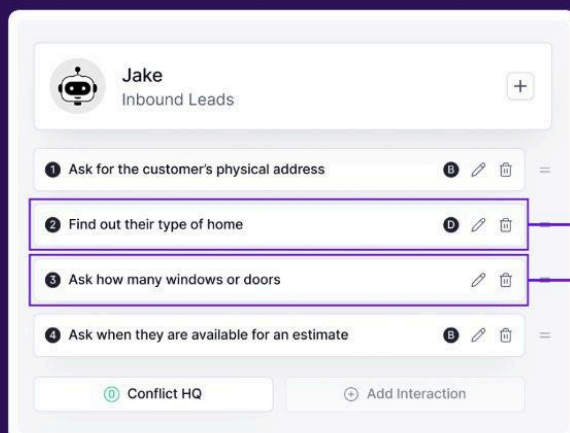
☐ Is it free from "hype"?

Hatch

Satisfy and scale with Hatch AI

Train and control AI bots unlike any other tool in the market—to qualify leads, book appointments, and generate pipeline for you to close. With Hatch AI, unlock the power to increase set, close, and retention rates in 67% less time.

BOOK A DEMO **TRY HATCH AI**

Jake
Inbound Leads

1. Ask for the customer's physical address
2. Find out their type of home
3. Ask how many windows or doors
4. Ask when they are available for an estimate

Conflict HQ   Add Interaction

9:41

Yesterday 10:15am

Great! And could you let me know what type of home you have? Is it a single-family, condo, or townhome?

Single family bungalow

Thank you for that information, Emma. Now, tell me how many windows are you looking to replace in your bungalow?

Get $500 for every customer you refer!

Here's how our referral program works:

1. Sign up with your name & email

2. Share Hatch with friends

3. Get a $500 Visa gift card via email for every customer that stays with us for 90 days

Visa Gift $500
1234 5678 1234 5678
EXP 00/00   VISA
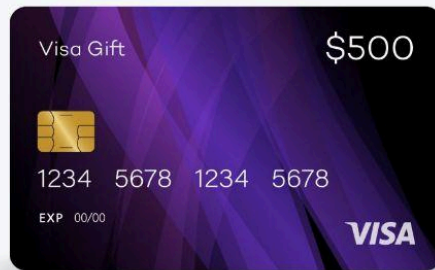
SIGN UP & START REFERRING

You don't have to be a Hatch customer to refer someone!

Hatch