FREE DOWNLOAD FOR BUSINESS BROKERS

SMS Templates and Texting Checklist

Copy these texts into your CRM, replace the *[brackets]*, and run through the checklist before you start texting buyers and sellers. Include the opt-out line in your first text to each contact.

When	Template (under 160 characters)
New inquiry	Hi [Name], it's [Broker] at [Firm]. Thanks for asking about [Listing]. Register and sign the NDA here: [link]. Reply STOP to opt out.
NDA reminder	Hi [Name], just a reminder: your NDA for [Listing] is ready to sign here: [link]. It takes about a minute.
Data room ready	Hi [Name], you're approved for [Listing]. Your data room login is in your email. Any questions, just reply here.
Price reduction	Hi [Name], [Listing] you asked about just had a price reduction. Want the updated numbers? Reply YES and I'll send them.
New matching listing	Hi [Name], a new [industry] business in [region] just came on the market. Want the details? Reply YES.
Appointment reminder	Hi [Name], reminder: our call about [Listing] is tomorrow at [time]. Reply C to confirm or R to reschedule.
After an email	Hi [Name], I just emailed you the next steps for [Listing]. Let me know if you have any questions.
Offer received (seller)	Hi [Name], good news: we received an offer today. Can I call you at [time] to go through it?
Due diligence deadline	Hi [Name], a reminder that the [document] for [Listing] is due on [date]. Reply if you need more time.
Closing day	Hi [Name], closing is set for [date] at [time], [place]. I'll be there. Text me with any last questions.
Seller check-in	Hi [Name], it's [Broker]. Thinking of you and the business. Any changes on your end? Happy to talk anytime.
Re-engagement	Hi [Name], still looking for a business? I have a few new listings that match what you wanted. Want me to send them?
After the sale	Hi [Name], congratulations again on the sale! If you know anyone thinking of selling, I'd be grateful for an introduction.

Before you start texting

- ☐ Register your business texting number (US: 10DLC brand and campaign registration).
- ☐ Add a text consent checkbox to your buyer registration page and inquiry forms.
- ☐ Decide who on your team texts which contacts, and from which number.
- ☐ Load your templates into the CRM.
- ☐ Set up workflows for reminders, price reductions and re-engagement.
- ☐ Make sure every reply lands on the contact record, not on someone's personal phone.

Suggested consent wording

> *"I agree to receive text messages from [Firm] about listings and my inquiry. Message and data rates may apply. Reply STOP to opt out."*

Have your attorney review the wording for where you work.

Every text you send

- ☐ Sent to someone who has agreed to receive texts.
- ☐ Your name and firm in the first message.
- ☐ Opt-out line (Reply STOP to opt out) in the first message, and from time to time after.
- ☐ One clear next step: a reply, a link or a time to talk.
- ☐ Under 160 characters where possible.
- ☐ No confidential details: no business name, financials, tax returns or CIM.
- ☐ Sent between 8 a.m. and 9 p.m. in the recipient's time zone.
- ☐ Every opt-out honored right away, and recorded.

Texting rules by country

Country	Main rules (general information, not legal advice)
United States	TCPA: prior express written consent for automated marketing texts; STOP opt-out; 8 a.m. to 9 p.m. local time; register 10DLC brand and campaign.
Australia	Spam Act 2003: consent; identify your business and contact details; working unsubscribe in every message, honored within 5 working days.
Canada	CASL: express or implied consent; name, mailing address and a phone, email or website; unsubscribe processed within 10 business days.
United Kingdom	PECR: consent for marketing texts to individuals, or the narrow soft opt-in; a free, simple opt-out when collected and in every message.
New Zealand	Unsolicited Electronic Messages Act 2007: consent; identify yourself; free unsubscribe by reply, actioned within 5 working days.

Text buyers and sellers from your CRM

Vertica CRM sends texts and MMS from the contact record, logs every reply like an email, shows all conversations in the SMS Control Panel, and sends texts automatically through workflows. Our onboarding team helps with setup and getting your texting approved.

Book a demo · +1 212 381 4994 (USA) · +61 3 8518 4759 (Australia)

The full guide: SMS for Business Brokers: How to Text Buyers and Sellers