Client texting

How do I know when to text a client?

Client should be texted any time that is the client's preferred method of communication, or if the client's preferred method of communication (Call, email) has not been successful in yielding a response from them. Client cell phone numbers can often be found in the account information in ESP, however if the CEA is having difficulty finding the client's cell number the sales rep should be able to provide that information as well.

What do I say when texting a client?

Much like email, if reaching out to a client for the first time by cell it's best to have a sales rep introduction or to introduce yourself to the client prior to discussing details.

When texting clients to introduce yourself include:
- Greeting the client by name
- Your Name
- The Publication the ad is for (typically this will be Clipper Magazine, but sometimes the publication will be Mint Magazine, Local Flavor, etc)
- Rep Name
- What you need from them
- Print date whenever possible

Some examples of Client Intro Texts can be seen below:

Hello (Client name)! This is (CEA Name) with (publication name), I'm the ad production partner for your sales rep (rep name). (rep name) informed me you were planning to send us new images today for your ad that prints on (print date). When you have those images ready, please text them to me here or email them to 1A@cmag.com and I can get your changes to a designer for you!

Hello (Client name)! This is (CEA Name) with (publication name), I'm the ad production partner for your sales rep (rep name). I assist (rep name) with getting ad information to our design team and I was hoping we could discuss the ad copy for your next ad printing (print date). Should we pick up same as the ad you ran last month, or would you like to freshen up the design?

Once the client already knows you

Once your clients are familiar with you, text communication can be much less formalized. Texts can be sent to the client like the samples below:

Hello (client name)! Your next ad goes to the printer on (print date), I emailed you a copy to clientemail@gmail.com, could you take a look when you have the time?

Hello (client name)! Attached is a copy of your ad from last month, should we pick up same as from that ad? The next one goes to the printer on (print date) and it hits homes on (mail date).

Sending proofs via text

There are several options for sending a proof via text. You can download a pdf directly to ATOL from your phone or screenshot the proof to send.

PDF Download through ATOL

1. Log in to ATOL on your phone and search the ad number
2. Click the button labeled "PDF"
3. This should download and launch the PDF in a window
4. Click the 3 dot menu in the upper right corner (or on iPhone this will be a box with an arrow through it)
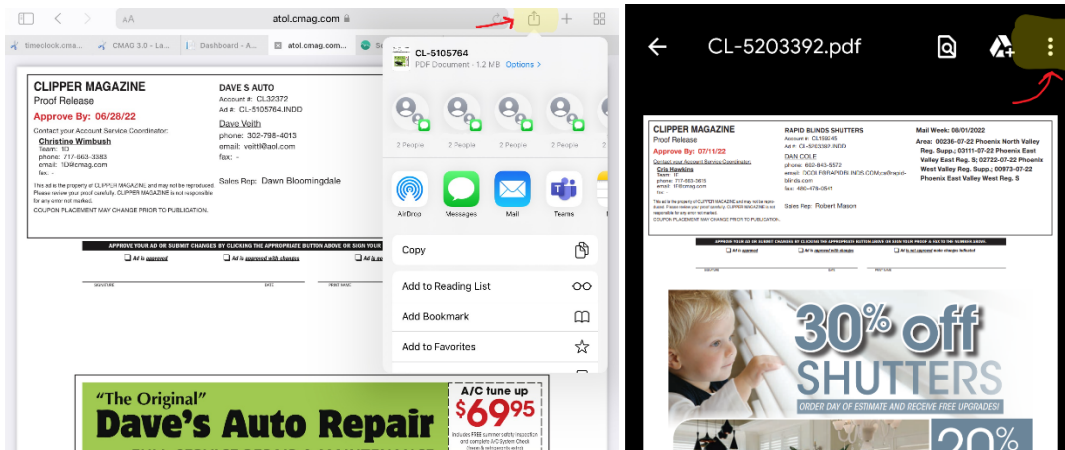
5. This should give you the option to send the file in different ways. Select "messages"
6. Send the PDF to the client via messages

Sending a Screenshot

1. Log in to ATOL on your phone and search the ad number
2. Click the button labeled "PDF"
3. This should download and launch the PDF in a window
4. Screenshot the PDF
5. Attach the PDF in a text to the client

Documenting approvals

1. Screenshot the approval sent by the client
2. Get this to your desktop by either emailing it to yourself from your phone, or uploading the image to Microsoft teams
3. Once the image is on your desktop, rename it to "Approval XXXXXXX", replacing the X's with the ad number
4. Drop the approval into the Job Jacket via DPS