The SMS+HubSpot Campaign Planner: 5 Ready-to-Use Playbooks with Message Templates, Timing, and KPIs

Contents:

Get a head start on your SMS marketing strategy with HubSpot. Below are 5 ready-to-use campaign plans tailored to common use cases — each one optimized for workflows, timing, and outcomes.

Appointment Reminders

Campaign Goal: Reduce no-shows and streamline confirmations.

Message Cadence:

1. 24 hours before the appointment
2. 2 hours before the appointment
3. Follow-up 2 hours after (if no-show)

Messaging Approach: Keep it short and polite with a clear CTA. Include location, time, and reply options (e.g., "Reply C to confirm, R to reschedule").

Workflow Tips:

● Trigger reminders from the HubSpot Meetings tool or calendar integrations.
● Use conditional logic to stop follow-ups when a reply is received.

SMS Templates:

- "Hi [First Name], just a reminder of your appointment tomorrow at [Time]. Reply C to confirm or R to reschedule."
- "We didn't see you today — need help rescheduling? Just reply R."

Suggested KPIs:

- ➢ Confirmation rate
- ➢ No-show rate
- ➢ Reply rate

Pro Tip: Use short links to add map directions or location info.

Flash Sale Campaigns

Campaign Goal: Drive urgency and spike short-term revenue.

Message Cadence:

1. Day before sale
2. Day of sale (early morning)
3. Last call (3-4 hours before close)

Messaging Approach: Create FOMO. Use time-limited language and exclusive benefits.

Workflow Tips:

- Sync with HubSpot marketing emails and social campaigns.
- Segment by past purchase behavior for targeted offers.

SMS Templates:

- "🔥 Flash Sale! 30% off everything today only. Shop now: [link]"
- "⏳ Only 3 hours left to grab your favorites. Ends at midnight! [link]"

Suggested KPIs:

- ➢ Click-through rate
- ➢ Promo code usage
- ➢ Sales generated

Pro Tip: Add emoji sparingly to boost visual attention without looking spammy.

Lead Nurturing for B2B Services

Campaign Goal: Move leads through the funnel and shorten sales cycles.

Message Cadence:

1-2 messages per week over 2-3 weeks

Messaging Approach: Value-first. Use SMS to support what's already happening via email.

Workflow Tips:

- Trigger based on form submissions, lead scores, or lifecycle stages.
- Personalize with HubSpot tokens and segment by industry or persona.

SMS Templates:

1. "Hi [First Name], saw you downloaded our guide. Would a free audit help you plan next steps? Text YES if you're interested."
2. "We just published a quick tip on [pain point]. Want the link? Reply TIP."

Suggested KPIs:

- ➢ Response rate
- ➢ MQL to SQL conversion
- ➢ Sales call bookings

Pro Tip: Use progressive profiling in HubSpot forms to fuel more personalized follow-up.

Webinar Promotion & Follow-Up

Campaign Goal: Maximize registrations and attendance, then nurture attendees.

Message Cadence:

1. 3–5 days before
2. Morning of webinar
3. 15 minutes before
4. Post-event follow-up (same day)

Messaging Approach: Friendly and helpful. Focus on the value of the session and ease of joining.

Workflow Tips:

- Use HubSpot's workflow builder to set delays and branches for registered vs. attended.
- Add post-webinar actions (e.g., meeting booking CTA or recap content).

SMS Templates:

- "Hi [Name], thanks for registering! We'll see you Thursday at 2PM. Save your spot: [link]"
- "We're live in 15 mins! Grab your seat here: [link]"
- "Missed today's session? Catch the replay: [link]"

Suggested KPIs:

- ➤ Registration rate
- ➤ Show-up rate
- ➤ Replay clicks

Pro Tip: Use text reminders to boost attendance by up to 30%.

Customer Review & Feedback Collection

Campaign Goal: Collect public reviews or private feedback to improve service.

Message Cadence:

1. 1 day after delivery or service
2. Reminder 3 days later (if no response)

Messaging Approach: Start with a feedback ask. If positive, then direct to the review site.

Workflow Tips:

- Branch workflows in HubSpot by NPS or satisfaction responses.
- Use dynamic fields to direct customers to different review platforms.

SMS Templates:

- "Hi [Name], hope everything went great! Mind sharing feedback? Just reply to this text."
- "Thanks! Would you be open to leaving a quick review? [link]"

Suggested KPIs:

- Feedback response rate
- Review conversion rate
- NPS or satisfaction score

Pro Tip: Use SMS first, then follow up with email to catch users on both channels.

Start with the use case closest to your business goals, plug it into HubSpot, and adapt it from there.