

# VERBAL SMS OPT-IN SCRIPT

Mission Real Estate · The CRM Plus  
Specimen v1.0 · thecrmplus.com

This script is read verbatim by every Mission Real Estate agent during a live phone call before any SMS is sent to a new contact. It is the only approved verbal opt-in path. The agent must hear the customer say “yes” before recording consent in The CRM Plus.

## STEP-BY-STEP MECHANICS

- 1. Live call only.** Consent is captured during a live phone call between the agent and the customer — never on a voicemail, never via a third party.
- 2. Read the script in full.** The agent reads the bold disclosure script below word-for-word. The script names the brand, the message purpose, frequency, opt-out, and rates language.
- 3. Wait for an affirmative yes.** The agent does not record consent unless the customer says “yes”, “sure”, “okay”, or an equivalent affirmative answer. “Maybe” / “I’ll think about it” / silence are recorded as NO.
- 4. Log it in The CRM Plus.** Inside the contact record, the agent taps **Verbal opt-in** and selects the date and time the call took place. The CRM stamps the consent with the agent’s user ID, the contact’s phone number, the source *verbal*, and a UTC timestamp. The record is immutable and shows on the audit log shown below.
- 5. Send the welcome text.** The CRM Plus then sends a single welcome SMS that re-states the program purpose, frequency, STOP / HELP instructions, and links to Privacy Policy and SMS Terms. If the contact replies STOP at any point, consent is permanently flipped to FALSE and no further SMS are sent.

## VERBATIM AGENT SCRIPT

“Hi, this is **[Agent first name]** calling from **Mission Real Estate**. Before I follow up by text, I need your permission to send you SMS messages. If you say yes, I’ll text you about your home search — listings, showing times, and follow-up about your active inquiry. We typically send between two and six texts per month. Message and data rates may apply, you can reply **STOP** any time to cancel, or **HELP** for help. Do I have your permission to text you at this number?”

## EXAMPLE AUDIT LOG ENTRY (CRM PLUS)

| Field                | Value                          |
|----------------------|--------------------------------|
| Contact              | Maria Sanchez · (818) 555-0142 |
| Source               | Verbal (live phone)            |
| Agent                | Jerry Ascencio Jr · user_id 1  |
| Date/time captured   | 2026-06-14 14:22:08 UTC        |
| Script version read  | v1.0 (this document)           |
| Customer reply heard | “Yes, that’s fine.”            |
| SMS consent flag     | TRUE                           |

|                                      |                                                   |
|--------------------------------------|---------------------------------------------------|
| Welcome SMS sent                     | 2026-06-14 14:22:31 UTC (msg_id SMb1...d73)       |
| Privacy / Terms shown in welcome SMS | thecrmplus.com/privacy · thecrmplus.com/sms-terms |

**WELCOME SMS SENT IMMEDIATELY AFTER CONSENT**

Hi Maria — this is Jerry with Mission Real Estate / The CRM Plus.  
You agreed by phone today to receive SMS updates about your home search.  
Msg freq 2–6/mo. Msg & data rates may apply.  
Reply **STOP** to cancel · **HELP** for help.  
Privacy: thecrmplus.com/privacy · Terms: thecrmplus.com/sms-terms