Send automatic SMS triggered by changes in data points

Alexis Vejvoda - 2025-05-29 - Comments (0) - How To Create Workflows

With the Workflow Builder, you'll be able to trigger intricate (or simple!) notifications to your subscribers when certain data points are updated in their subscriber profile.

For example, let's say you want to send a series of messages once a subscriber becomes a paid customer.

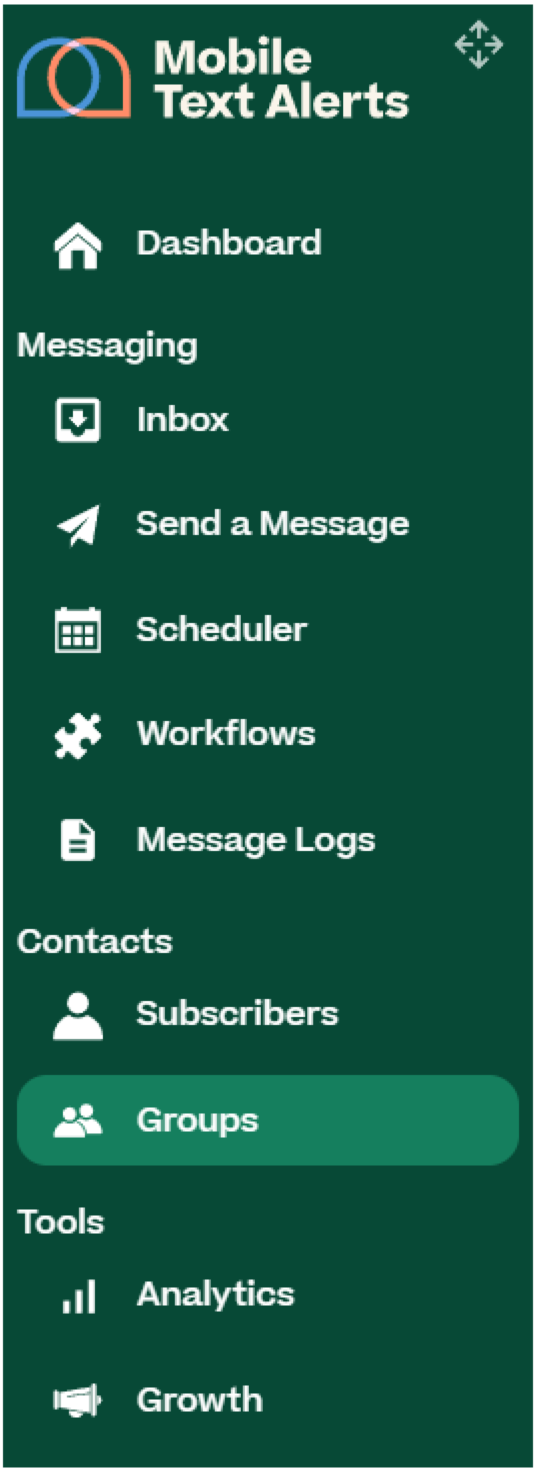
This article will walk you through how you can do that.

Step 1: Make sure you have a group for the attribute that you want to use as the trigger data point

In order to set up a triggered automated message, you'll need to set up a group for the attribute that you'd to use as the trigger for.

(Note: if you're not yet tracking the specific attribute that you'd like to be the trigger, you can create the attribute under the “Subscribers→Attributes” tab.)

Go to "Manage Groups" tab.



Then click "Add Group."

Name the group, give it a description, and designate the group as "Adaptive." That way, your subscribers will be automatically added to the group when certain data points are updated.

For the purposes of this tutorial, we are setting up the group with the conditions "Paying customer" attribute "is not empty." This means that as soon as there is any value inputted for a subscriber's "Paying customer" attribute, that subscriber will automatically be placed in this group.

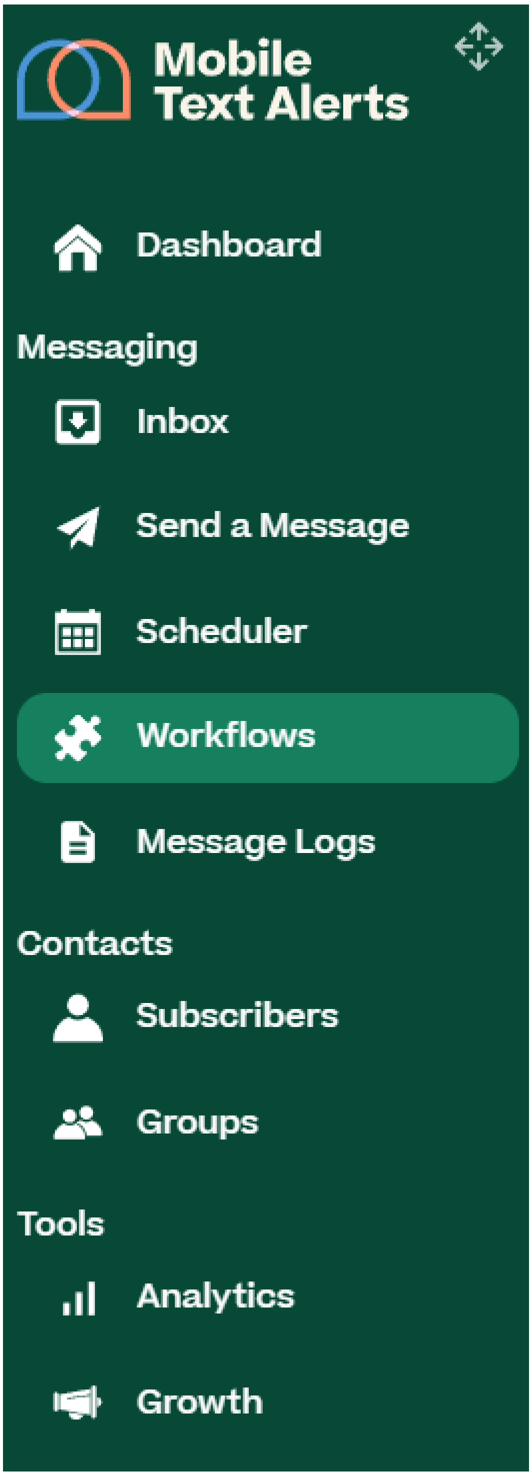
(So in this example, as long as we keep our data up to date, all of our subscribers who are paying customers will be automatically listed in this group.)

Click "Add Group" to create your new group.

Step 2: Create a new workflow

The next step is to create a workflow.

You can do this under the "Workflows" tab.



Select "Add Workflow."

Click "Recurring."

Choose to trigger option as "When a subscriber joins a group."

Select the group that you just created as the "trigger group" (in our example case, the group is "Paying customers").

Click out of the drop-down menu and then select "Confirm."

Step 3: Add a "Send a Message" action

You're now ready to set up the message (or series of messages) that you'd like your subscribers to receive.

First, drag a "Send a Message” action into the workflow editor.

Click within the “Send a Message” action that you just dragged into the editor and type in the content that you'd like to be sent to your subscribers whenever they are added to this group.

Click “Confirm” to save your message.

Step 4: Add any other elements to your workflow

If you'd like to add any other elements to your workflow, you can do that by dragging and dropping any actions into your desired place in the workflow editor.

For example:

- You could add a series of "Wait" and "Send a Message" actions if you'd like a whole sequence of messages to go out to these subscribers over a period of time.
- You could add an A/B test journey to see what kinds of messages perform better as far as convincing your subscribers to take a particular action (such as making a purchase)

- You could add a "Wait" for 7 days and then add a "Branch" action to check if a subscriber has taken a particular action (such as making another purchase). If the subscriber hasn't taken the action, they could receive a text message incentivizing them to make another purchase.

Step 5: Save and start your workflow

After you've added all of the elements that you'd like to include in your workflow, make sure to save your changes.

When you’re ready for your messaging flow to go live, click “Options→Start.”

Now, whenever a subscriber is automatically added to your adaptive group, they'll be automatically placed within this new workflow.