

The Marketing Playbook for Converting Leads with AI-Powered SMS



Introduction

Marketing teams allocate a significant portion of their budgets to search and digital advertising to drive demand for their business. But too often, that budget is wasted when high-intent leads fail to turn into revenue.

Sales teams don't follow up fast enough with web form leads to convert them. Phone calls to contact centers and locations go unanswered. Online shopping carts are abandoned.

Marketing leadership performance is measured by the revenue it generates, so breakdowns in the lead conversion process will result in breakdowns in your success.

This playbook shows how modern marketing teams use AI-powered SMS as a conversion channel to capture high-intent leads, convert more demand, and improve revenue outcomes from paid media campaigns.

Moreover, you can enhance your conversion rates and ROAS without making any changes to your campaigns. This is simply a new—and often better—way to convert the leads you are already paying to generate



Abandoned Forms

Slow Follow-up

Missed Calls

Stalled Bookings

SMS



SMS Conversations Are Now a Buying Channel

The way leads engage with businesses has evolved. Generative AI tools like Google's AI Mode and ChatGPT have made the way consumers choose products and services more conversational. People expect to be able to ask business questions, get clarity on products and services, and receive the help they need through their conversations to make informed decisions. And they want to do it instantly.

SMS fits naturally into this behavior.

Text messages are fast, familiar, and engaging, allowing leads to continue conversations at their own pace without waiting on hold or restarting their journey. When SMS is offered as an option, engagement increases, and campaign conversion rates and ROAS improve.

74%

said they are more likely to do business with a company if they offer SMS as an option

90%

of consumers prefer engaging with businesses via SMS

98%

average open rate for SMS

Sources: LivePerson, SlickText, Sender.net



Leads Are Lost Without Timely Conversations

Even the most finely optimized search and digital campaigns break down when leads can't connect in conversation with businesses.

Conversation breakdowns happen everywhere. Consumers who fill out web forms never hear back, or the follow-up comes too late. Calls to contact centers and locations go unanswered. Leads abandon online applications and booking flows when they can't get answers to questions.

When response times stretch from minutes into hours, leads go cold, and revenue is lost.

Each missed or stalled interaction also wastes your paid media budget. But this is not a demand problem. It is a conversion problem.

Lead Follow-Up Delays Are Now a Critical Marketing Problem

Most consumers buy or book from the first company to respond. Leads contacted within minutes of submitting a web form are far more likely to convert than those contacted later, and after an hour, the likelihood of them making a purchase drops dramatically.

For marketing leaders, slow responses inflate cost per lead, reduce ROAS, and weaken returns. Even the strongest campaigns underperform when leads are unable to engage while their intent is at its highest.

Speed is no longer just an operational detail; it is a strategic advantage. It is a conversion lever that directly impacts marketing performance.

78%

of customers buy from the first company that responds

Contacting a lead within 5 minutes makes you

21x more likely to convert

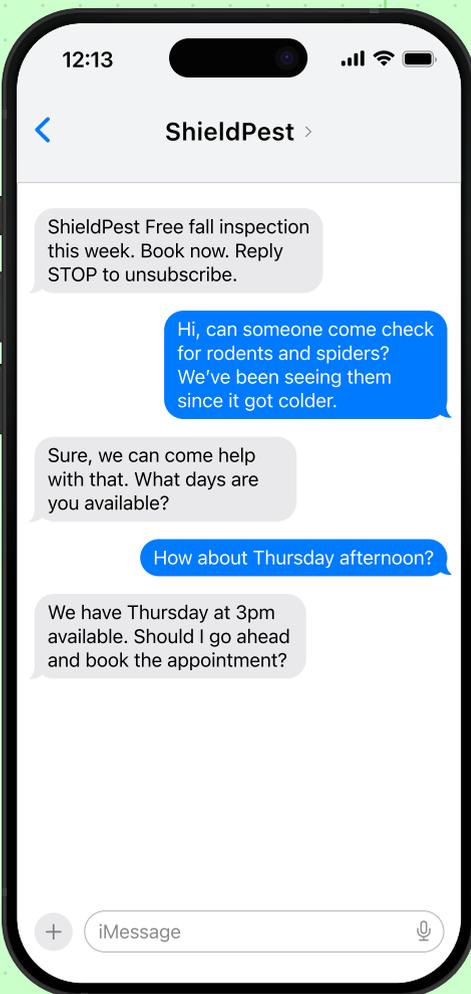
After a 1-hour delay, contact success drops by

over 90%

Source: Harvard Business Review

AI-Powered SMS Is a Game-Changer for Marketing Teams

CONVERSION-FOCUSED



TRADITIONAL

SMS can directly address one of the biggest conversion challenges marketing teams face—stalled or missed conversations at moments of high intent—but only if it avoids becoming another dead-end conversation channel for consumers.

Manual SMS responses require too many resources for businesses to keep up. And traditional SMS tools were built for one-off notifications and mass blasts. They push messages—they don't engage in conversations. They lack the ability to guide leads, qualify intent, or drive measurable revenue outcomes.

But AI has changed all that. High-performing marketing teams are now utilizing AI-powered SMS to respond instantly when leads reach out, continue conversations when call forms or calls stall, qualify and prioritize high-intent leads, and guide leads toward a clear next step, like booking an appointment or callback, in real-time.

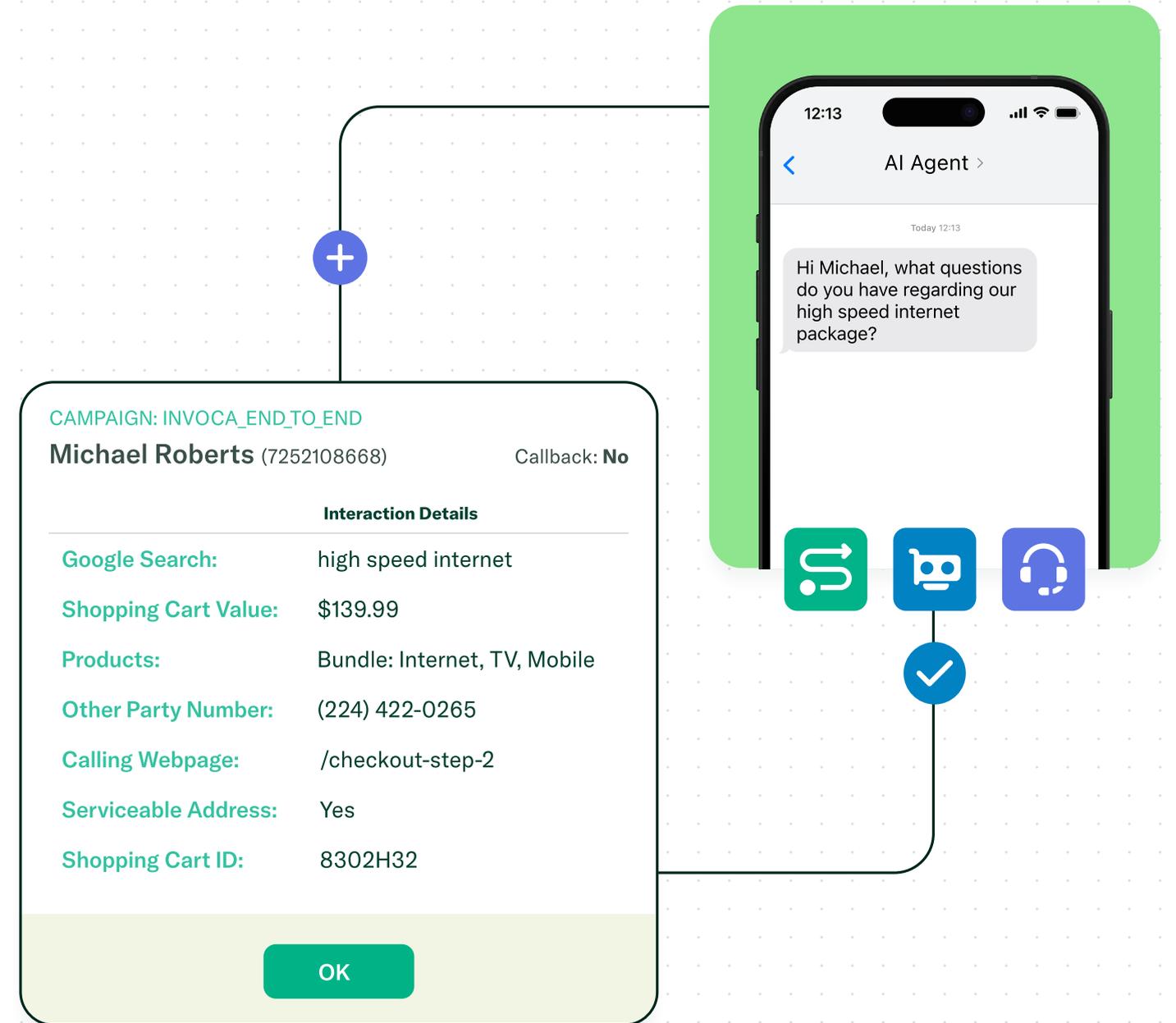
With AI, SMS becomes a conversion channel, and it's one that marketers can own completely.

AI Turns SMS Into a Conversion Engine

When SMS is powered by context and automation, it does more than respond.

Conversations begin with an understanding of where the lead originated, like the ad they clicked, the contents in their shopping cart, and the webpages they viewed. Questions are answered accurately and on-brand. Intent is qualified naturally through conversation. High-value opportunities are identified and guided toward the next step, whether that is booking an appointment or scheduling a callback.

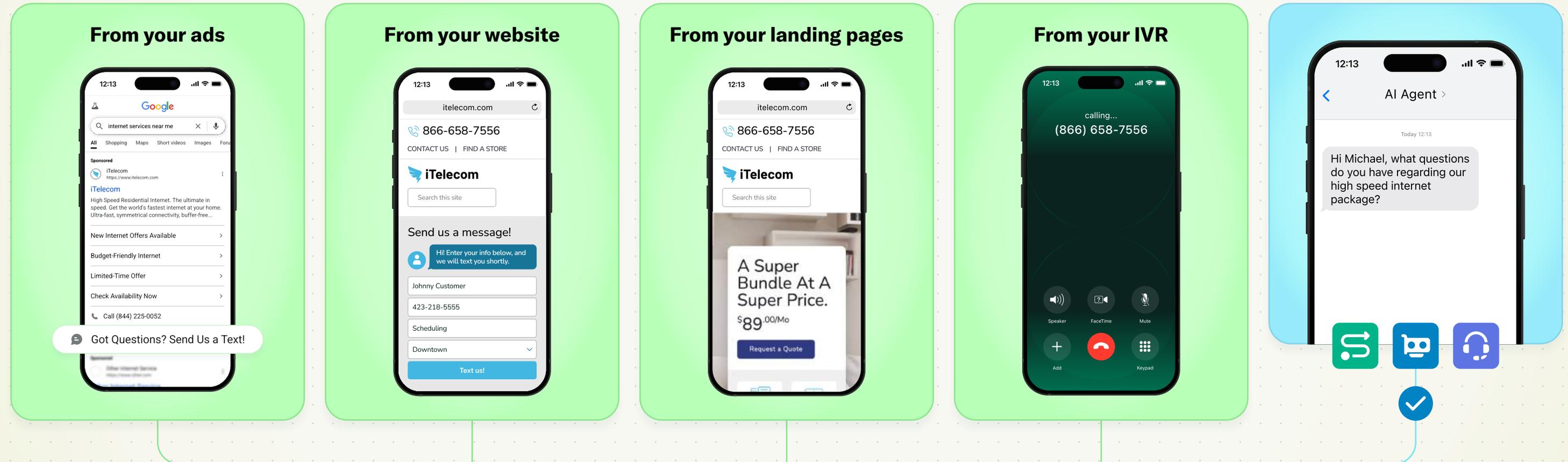
Momentum stays high, and revenue leakage decreases across the journey.



Where AI-Powered SMS Fits in the Lead Journey

AI-powered SMS is most effective at the moments where conversion risk is highest. These moments include missed or unanswered calls, after-hours demand, lead form follow-ups, stalled form fills, abandoned booking flows, and overflow during peak call volume.

No matter where the lead starts, SMS keeps the conversation going without forcing them to start over. Instead of ending the interaction, AI-powered SMS preserves momentum and increases conversion.



Here are a few ways you can use Invoca's AI Messaging Agent to improve your conversion rates and boost revenue.

1. Provide instant follow-up for web form fills

2. Keep leads progressing after hours or during peak call times

3. Instantly answer questions and convert leads on eCommerce sites

Consumers are impatient, and nobody wants to wait around for a business to respond after filling out a web form. With Invoca's AI Messaging Agent, you can immediately start a conversation with leads when intent is highest.

Just provide an option on your web form to be contacted via SMS. When the lead selects it, the AI Messaging Agent instantly engages with them to answer any questions, schedule a call, or book an appointment. This reduces the chances that they will start researching other options and greatly increases the likelihood that your company wins their business.



Here are a few ways you can use Invoca's AI Messaging Agent to improve your conversion rates and boost revenue.

1. Provide instant follow-up for web form fills.

2. Keep leads progressing after hours or during peak call times

3. Instantly answer questions and convert leads on eCommerce sites

There are inevitably times when you cannot answer sales calls. In fact, [our data shows](#) that 39% of calls to businesses are never answered by a person.

Valuable leads are frequently lost when they call outside of business hours, on weekends, or during peak times when queues are long. With Invoca's AI Messaging Agent, you can keep leads engaged and progressing, 24/7.

Here's how it works. You set up your IVR to give callers the option to move the conversation to SMS. The AI Messaging Agent can then answer any questions they have, schedule a callback time, book an appointment, or even complete a sale.

This keeps leads from going cold or heading to the competition, increasing your conversion rates and revenue.



Here are a few ways you can use Invoca's AI Messaging Agent to improve your conversion rates and boost revenue.

1. Keep leads progressing after hours or during peak call times

2. Provide instant follow-up for web form fills

3. Instantly answer questions and convert leads on eCommerce sites

Lead dropoff frequently occurs when a potential customer can't find answers to their questions on your website or when they encounter difficulty during checkout.

Providing the option to chat via SMS on high-intent landing pages, in the shopping cart, and on product pages ensures that leads can get instant answers to any questions they may have.

The agent can even take over the checkout process to set an appointment or assist with a purchase, so the consumer doesn't have to return to the web experience to complete it themselves. This reduces the likelihood of lead drop-off and increases your conversion rates.



Connect Your Buyer Journey Data Across Every Channel

Marketing leaders care about revenue outcomes, not just activity.

The most important signals are leads recovered from missed interactions, appointments booked, and callbacks, as well as improvements in speed to lead and conversion lift from stalled demand. When SMS conversations are connected back to originating campaigns, teams gain clear visibility into what converts and where to scale.

This is how AI-powered SMS earns its place as a revenue channel. It's an integrated part of Invoca's AI ecosystem, making it the only AI messaging agent that ties every SMS, callback, and conversion back to the original marketing source, proving ROI across the buying journey and powering smarter marketing optimization.

Vital Stats

Total SMS

5,467

SMS Leads

4,112

Appointments Booked

2,987

Revenue

\$345,678

Marketing Source	Call Count	Leads Calls	Converted on Call
Google Ads	4,512	81%	53%
Google My Business	1,449	72%	45%
Organic Search	1,213	76%	50%
Facebook Ads	1,011	83%	59%





Configure your agent

- ✓ Trained on call recordings
- ✓ Learned knowledge docs
- ✓ Customized tone & brand

How Teams Typically Get Started

AI-powered SMS conversion does not require a long or complex rollout.

Most marketing teams begin with a single high-intent use case, define when SMS should engage, review conversation guardrails, and go live quickly. Early results are monitored closely, and the experience is refined based on real conversations.

The focus is speed to value, not perfection.

Expanding After Proving Impact

Once results are proven, teams typically expand AI-powered SMS across more entry points in the journey.

Additional use cases are added, qualification becomes more in-depth, routing becomes more intelligent, and SMS is applied across more campaigns, locations, or business lines. Over time, SMS becomes an always-on conversion channel tied directly to revenue growth.

You capture revenue that is currently leaking



You turn more conversations into conversions



You increase ROI from paid media



Final Takeaway

SMS is no longer just a means of sending messages. When used intentionally, it becomes a powerful conversion channel that helps marketing teams turn more leads into revenue without increasing media spend.

Next Steps

Hopefully, this playbook has given you ideas on how to use AI-powered SMS to improve your lead conversion rates and marketing ROAS.

To learn more about how AI-powered SMS can improve lead conversion and marketing ROI, visit invoca.com or contact Invoca to explore potential use cases for your business.

About Invoca's AI Messaging Agent

Invoca's AI Messaging Agent is built to help marketing teams turn high-intent conversations into measurable revenue outcomes.

The agent combines AI-driven SMS conversations with buyer journey context and conversion attribution, transforming SMS into a true performance channel. It is pre-trained on your calls, enabling it to speak in your brand voice and guide conversations toward meaningful next steps from day one.

By connecting digital journey data, call history, and approved brand sources, Invoca's AI Messaging Agent delivers accurate, personalized responses that help consumers move forward—whether that means booking an appointment, requesting a callback, or getting a quote.

The result is 24/7, instant, two-way SMS conversations that meet consumers in their preferred channel and preserve momentum at the moments that matter most.



 AI Agent
Hi Jordan, thanks for reaching out about the new SUV! Are you looking to book a test drive?

 Jordan
I am.

 AI Agent
Great. I can set that up. Do you prefer today at 3:30 PM or tomorrow at 10:00 AM?

 Jordan
Tomorrow at 10.

invoca.com