

## Considerations when selecting a text messaging vendor

**There are hundreds of vendors that provide SMS services. How do you pick one? What questions should you ask before signing a contract?**

- ✓ **How will health department staff interface with the SMS application?** Typically, the vendor provides a web-based interface into which subscribers' cell phone numbers are entered, along with the text messages you want to send. For the staff member(s) who will be sending out text messages, how easy is the interface to use? What does the interface look like? Does it seem intuitive or will it require training? What kinds of reports (metrics related to opt-in/out, messages sent and received, etc) can the administrator<sup>1</sup> run? How many administrators can use the system? Can you assign different levels of access to different administrators? Can you schedule messages in advance? How intuitive is it to update a subscriber's preferences or remove them from your list?
- ✓ **What is the subscriber interface like?** Typically, the subscriber<sup>2</sup> either sends a text to a short code<sup>3</sup> or goes to a website to join. Subscribers might add demographic information about themselves, including address, zip code, gender, etc. How can subscribers opt in and opt out? Can they opt in using a short code? Is it password protected? Is the vendor able to create a widget that can be placed on your own public health website where subscribers can go to for opting-in? What protections does the vendor have in place to prevent spam or bots from opting into your system?
- ✓ **How are groups of subscribers managed?** It's likely that you'll have several groups for each text messaging campaign that you run. For example, you may have groups of people who will receive Spanish language messages, and others who will receive messages in English. Or, you may be sending people different messages depending on the frequency that they have indicated they want. How easy is it to group numbers and access them?
- ✓ **Can you both send and receive messages?** Does the vendor allow two-way messages, or just one-way? If you want to receive messages, how easy is it to access texts messages sent in by your subscribers and then respond? Can you automatically generate a response to a message based on certain words texted in by a subscriber? For example, if you send a survey question via text, can the system send a follow-up text based on the subscribers' text response?
- ✓ **How are short codes and keywords managed?** Typically, vendors will have multiple agency users sharing a short code for messaging programs on the same topic, such as "health and safety." Subscribers opt into the program they're interested in by texting a key word to the shared short code. For example, our emergency preparedness messaging program subscribers joined by texting the word "Prepare" to our vendor's short code. If the vendor has a lot of agencies sharing a code, common key words may not be available, such as "health" "help" or "info." Check to see if other key words that you might use when you ask your participants a question such as "yes" or "no" are available for use. Ask how key words are managed and what words might be available. Try to find out what other agencies are sharing the same short code you will use.

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<sup>1</sup> An administrator is an employee who accesses the subscriber database, sends messages, or manages reports.

<sup>2</sup> A subscriber is the message recipient – the person who opts in to receive your messages.

<sup>3</sup> A short code is a short "telephone" number – typically 5 or 6 numbers - that link the text message to the recipient

✓ **Can multiple work groups be billed separately?** If several work units within one agency or departments within a larger organization want to share the same contract with your vendor, they'll likely want to share the same contract, short code and administrative interface. How easy is it for the vendor to bill your work unit for just the texts you send? How is billing managed?

✓ **Can you send text messages from your home computer?** You may want to access the interface from a remote computer or from your mobile phone (e.g. from your home, during an emergency). Can the interface only be accessed using special software on your desktop, or can you access it from any computer? Is there a way to send a message to your participants using your own mobile phone without accessing the web interface?

✓ **How secure is the vendor's database systems?** Ask the vendor for information on the security of their system including whether they have multiple servers that store the information in the database. If there are multiple servers, where are these servers located? Does the vendor have redundancies if their system goes down? What is their model for ensuring secure delivery of messages to the carrier? So they send the messages to multiple aggregators or do they have multiple pathways to one aggregator to decrease the likelihood of a message not getting to the aggregator?

✓ **How does the vendor protect your data?** If an emergency (like a big fire or earthquake) disrupts your vendor's server location, is there a back up in another state? What systems are in place to provide redundancy in the event of a major physical disruption? How secure is the location? What about security of your database and information in the event that someone tries to hack into the vendor's system?. How does the vendor back up data and restore it?

✓ **How does the vendor work with the cellular phone carriers?** Your goal is to assure that your vendor can reach subscribers in your area regardless of the cellular carrier they use.

SMS vendors (called "aggregators") are labeled Tier 1, Tier 2 or Tier 3. Tier 1 vendors have direct connections directly with at least 4 of the top 5 carriers (AT&T, Sprint/NEXTEL, T-Mobile USA, U.S. Cellular, and Verizon Wireless) and many of the small ones as well. Tier 2 has direct connections with at least 3 of the top 5. Tier 3 companies typically buy access from Tier 1/2 vendors and then re-sell their services to a local market.

If you live in an area that is served by a small cellular carrier, the company you work with will likely be a company that specializes in the small carrier and has connections with larger aggregator(s) who work with the big carriers. Alternatively, you might contract with a larger aggregator that in turn works with smaller Tier 3 vendors that have connections with the local, smaller carriers.

Direct connections with carriers assure that your text messages will go seamlessly through the telecommunications system with minimal delay. However, large vendors are often more expensive and may not be interested in working with a client unless that client has a large volume of texts messages each month. Some aggregators may simply serve as a gateway to the carriers and require that your IT department will build its own messaging application.

✓ **What is the vendor's guaranteed through-put?** Some vendors specialize in marketing – where timeliness of messages delivery isn't absolutely essential. In the health field, an example might be messages encouraging smoking cessation. Other vendors specialize on the guaranteed delivery of messages within a certain time frame, such as vendors who focus on emergency alerts. Different

vendors have different levels of access to the telecommunications gateway, which may limit the number of texts they can send in one minute – their through-put.

Typically, vendors who specialize in emergency alerts may pay more attention to gateway access, but will charge more for this. If most of your messages will be preparedness or other types of health promotion where timeliness is not absolutely essential, then going with a vendor that specializes in marketing may be more appropriate.

Note that the contract you have with the vendor will stipulate the through-put, and this rate may differ from the throughput described by the company's sales staff. In other words, if the vendor does not deliver on what's promised (e.g. to get out X# thousand text messages within X# minutes) what sorts of penalties is the vendor prepared to pay?

✓ **Cost:** Vendors charge according to a number of different schemes, including set up fees, number of texts per month, pre-paid blocks of texts, or by the text.

*Set-up fees:* Ask about the pricing structure for customization of the web interface and/or customized widgets (for example, a widget you put on your website that people click to go to the user interface, which is typically hosted on the vendor's website). Some vendors will include a set amount of customization in their charges, while others charge additionally for developers' time. All vendors will charge extra if you want a dedicated short code.

*On-going fees:* Deciding on whether to go with a vendor that offers pay-per-text or a monthly fee will likely depend on how many messages you plan to send. Service providers typically establish tiers of fees according to the number of messages sent (and received back to you) on a monthly or annual basis. Some providers utilize a credit-based system whereby a client can purchase a block of credits that will in turn pay for a certain amount of text messages sent and received.

*Monthly fee:* Vendors will often offer a monthly service package of outgoing messages based on level of usage, such as 0-5,000, 5,000-10,000, etc. This monthly rate may also include licensing fees, maintenance and support. Optional services may be added for additional monthly fees.

*Pay-per-text:* To send out messages to end-user clients, vendors often develop a pricing scheme based on the volume of messages delivered. For example, up to 10,000 outgoing messages may cost approximately \$0.08/message, with greater volumes at a lower rate.

✓ **How much technical assistance and support will you receive?** Does the vendor provide training to staff? Is there an added cost for training? Are they available 24/7 for support if you have questions? What is the turn around time for getting new key words? Who is available when you need to trouble shoot? Response time should be spelled out in your contract.

The vendor should also be prepared to guide you through your text message design and development, and provide information about industry best practices. For example, it's important to let subscribers know that they can text "stop" to your short code to be removed from the subscriber list.

✓ **Does the vendor provide marketing and promotion services?** Some vendors provide this service, but it will be for an extra fee.

✓ **What are the vendor's business operations like?** Having a strong, close relationship and long history means they are better able to handle situations when issues with the carrier come up, like policy

changes. The SMS marketplace is continually evolving. Does the vendor seem like it will be around next year, and in upcoming years? If you need to move to another vendor, how easy is it to move data in and out of the system? What kinds of references does the company have? Who are its typical clients?

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