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Speed up US short code provisioning for COVID-19 use cases

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Introduction

As the coronavirus pandemic unfolds, we're receiving lots of queries about short code provisioning.

Businesses want to know how to make the process faster, more likely to end in approval – and generally as painless as possible.

This spike in interest is no surprise. Short codes are 5 or 6-digit originators (or numbers) that help brands deliver time-sensitive communications to large audiences. Short codes are a critical channel for alerts, reminders and communications at the best of times. In times of crisis, we need them even more.

So getting short code campaigns set up and approved quickly by mobile operators (the gatekeepers of the mobile messaging ecosystem) is key. And short code provisioning is one of the most important processes to get right.

This guide will take you through the short code provisioning process, step by step, and help you put together a program brief that has the best chance of gaining approval by mobile operators. (It focuses specifically on short code provisioning for COVID-19 messaging campaigns. But much of the information will apply for your everyday campaigns too.)

If you need more help or have questions about anything that isn't covered below, get in touch.

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Step 1

A sense check

(before you even start)

If you're reading this guide, chances are you're in a hurry to get your short codes provisioned.

Emergency situations like the one we're in today change quickly, and communications have to be timely.

You probably need your campaign to be ready yesterday. But a little less haste at the beginning will mean more speed later on. Your first task should be to assess your proposed messaging program's chances of being approved. In other words, is it an acceptable use case?

The restrictions around coronavirus-related communications are understandably tight, so if you want to maximize your chances of approval, play it safe.

We have a list of use cases that have successfully sought approval already. Use it as a guide and you'll save yourself some wasted time and effort.

Coronavirus-related messaging use cases we've seen approved so far:

- Appointment reminders
- Test result notifications
- Symptom checker campaigns
- Instructions about how to self-quarantine
- Travel updates, e.g. for trip cancellation
- Business hours updates, e.g. grocery stores changing their hours or offering early hours exclusively for senior citizens or critical workers
- Employee communications, e.g. announcing workplace closures or instructions for home working
- School and university alerts, e.g. about campus closures
- Local and state alerts and updates

Of course, even a 'safe' use case isn't guaranteed the green light. You have to submit your short code campaign for approval in the right way. So let's look at how to do that.

Step 2
Use an existing short code
(if possible)

If you currently have an approved short code in production, and would like to include COVID-19 messages that are in line with the brand and use case, you can reach out to your account manager to do so.

This only applies for programs that a) are already approved by all carriers and b) include messaging that fit your brand and use case.

For example, if you're a retail store and you already have a coupon messaging program, you could add on COVID-19 messaging about your new store hours during the pandemic.

Step 3
Get a new short code

Once you've established that you need a new short code, you can either obtain it yourself directly from the CSCA or have OpenMarket obtain it for you.

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Step 4
Put together a program brief

This is the step businesses tend to struggle at. It can be tricky navigating the paperwork – knowing what information you need to supply and why. There are a few key questions to ask in preparation.

How will you tell your audience about the program?

You need people to opt into your program, which means you need to think about how they're going to find out about it in the first place. (There are some COVID-19-specific exceptions* to this opt-in rule, which we'll cover later.)

So you need to include information about how you'll advertise your program. You don't need to be super-specific about exactly what your phone call, email, billboard or radio ad is going to say, but you do need to include some general information about how you'll get the word out.

How will they sign up to receive messages?

Almost all mobile messaging programs require express consent from the recipients. So how are you going to get it? It could be an online sign-up, or an advertised keyword people can text to a number. Every SMS program needs a corresponding website (with its own requirements we'll outline below) and that's where you'll often find a sign-up form.

How will you communicate with them?

Once they've signed up, what are you going to send them? Will it be a single-item program or a recurring one? There are a few requirements to cover here.

You have to provide a confirmation message – the first they receive after they sign up. And you have to provide an example of the coronavirus-related content you'll be sending in your messages. For example, you might be a government giving updates on testing facilities or a retail store providing new business hours.

Let's take a look at the CTIA and carrier compliance requirements (in the US) in a bit more detail. It's written in italic so you can easily skip this if it's too much to take in.

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Requirement for SMS Message Flows

Some terms to understand first

MT stands for "mobile terminated". An MT is a message sent from your system to a customer's mobile phone. To put it another way, the message ends (or is terminated) on the mobile phone.

MO stands for "mobile originated". This is a message sent from your customer's phone to your system. In other words, the message 'originates' from a mobile phone.

SMS Opt-in for a Recurring Message

Required elements:

- MO: Keyword or website or voice
- Program name or service description
- HELP instructions (customer care information can also be used – toll-free number or email address).
- Opt-Out instructions, e.g. Reply STOP to cancel
- Program quantity or recurring messages disclosure for subscription services, e.g. recurring, subscription, 5msgs/wk
- Message and data rates may apply disclosure

SMS & Web Opt-in for a Single-item Message

- MO: Keyword (e.g. ALERTS) or website or voice
- Program name or service description e.g. your brand, government body or alerts service

HELP Messages for all Message Flows

- MO: Keyword e.g. HELP
- Program name or service disclosure
- Customer care contact information, e.g. toll-free number or support email address

STOP Messages for all Message Flows

- MO: Keyword e.g. STOP, END, QUIT, CANCEL, UNSUBSCRIBE
- Program name or service disclosure
- Confirmation that no further messages will be delivered
- Multiple campaigns on a single short code will all be opted out

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Requirement for websites

Recurring Call-to-Action Keyword Opt-In Web Page

- Program (brand) identification
- Program description — explanation of service offered
- 'Service delivery frequency' message disclosure, e.g. recurring subscription, 5 msgs/wk
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Complete T&Cs or link to T&Cs page
- Privacy Policy or link to it
- Opt-out instructions, e.g. Reply STOP to 12345 to cancel. May appear on separate page in the terms and conditions
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

Recurring Call-to-Action Website Opt-In Web Page (same as keyword opt-in requirements)

- Program (brand) identification
- Program description — explanation of service offered
- 'Service delivery frequency' message disclosure, e.g. recurring subscription, 5 msgs/wk
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Complete T&Cs or link to T&Cs page
- Privacy Policy or link to it
- Opt-out instructions, e.g. Reply STOP to 12345 to cancel. May appear on separate page in the terms and conditions
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

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Recurring Terms & Conditions Web Page

- Program (brand) identification
- Program description — explanation of service offered
- 'Service delivery frequency' message disclosure, e.g. recurring subscription, 5 msgs/wk
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Customer care contact information, e.g. support email or toll-free number
- Opt-out instructions, e.g. Reply STOP to 12345 to cancel
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

Single-item Call-to-Action Keyword Opt-In Web page

- Program (brand) identification
- Program description — explanation of service offered
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Complete T&Cs or link to T&Cs page
- Privacy Policy or a link to it
- Opt-out instructions, e.g. Reply STOP to 12345 to cancel
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

Single-item Call-to-Action Website Opt-In Web Page

- Program (brand) identification
- Program description — explanation of service offered
- Opt-out instructions, e.g. Reply STOP to 12345 to cancel.
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Complete T&Cs or link to T&Cs page
- Privacy Policy or link to it
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

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Single-item Terms & Conditions Web Page

- Program (brand) identification
- Complete T&Cs or link to T&Cs page, hover over, or pop-up
- Program description — explanation of service offered
- 'Message and data rates may apply' disclosure
- Full T&Cs must indicate disclosure
- Customer care contact information, e.g. support email or toll-free number
- T-Mobile requires a disclosure that states carriers are not liable for delayed or undelivered messages

Exceptions for COVID-19 messaging campaigns

There are currently no special requirements for COVID-19 programs. But exceptions to normal short code provisioning rules have been introduced. These refer to specific use cases. For example, when a government agency is sending out emergency alerts, it doesn't need express consent from recipients. You can read more about the FCC's recent COVID-19 ruling here.

Conclusion

We've thrown a lot of detail at you in this guide, but a little preparation will go a long way in ensuring a speedy short code provisioning process.

The more detail you can give up front, the less likely you are to face questions or objections from carriers when they review your request. Do the due diligence now and you could cut days from the process.

Need help getting your short code campaign up and running fast? OpenMarket can help.

Get in touch