Best practices Section Outline & Content

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Appendix: Internal approval process

> As of 9/17/24. This content has been approved and copy edited. It is ready to be used for implementation for user testing.
>
> For implementation guidance and suggested design patterns see this document:
> 🗒 Component / Design for updated Guidance section

Copy Updates

What	When	Comments	Ticket #	Status
Quarterly content	2/4-	Accuracy, plain language	[2277](#)	Review complete

check	3/20	Make comments in this document until		
Operationalizing your content	2/25	New tips created to incorporate a campaign planning worksheet (PDF) that helps partners operationalize their texting campaign/program	[2342](#)	Review complete
tbd	tbd	tbd	tbd	tbd
tbd	tbd	tbd	tbd	tbd

Best practices

For texting the public

Effectively reaching your audience and supporting your program's goals starts with strategically planning out what text messages can help you achieve and how to approach a thoughtful rollout.

This set of best practices will help you get an effective texting initiative up and running.

Key elements of a texting campaign

Establish clear goals
Start with a singular purpose. Make explicit what you want to achieve.

Follow rules & regulations
Understand what is required when texting the public.

Establish trust
Help your audience anticipate and welcome your texts.

Write texts that provoke action
Help your audience know what to do with the information you send.

Send texts in multiple languages
What to know as you plan translated texts.

Measure performance with benchmarking
Learn how effective your texting program can be.

Establish clear goals

Start with a singular purpose. Make explicit what you want to achieve.

Text messaging should be one part of how you communicate with the people you serve, and it is best used to provoke action or influence behavior. Therefore, when starting to plan your texting campaign, it's important to start with the end in mind.

To establish clear goals, start by answering the following questions:
- *Who* do you want to text?
- *At what moments* do you want to text them?
- *Why* do you want to text them?
- What do you want them to *do*?

Dept. of Human Services: We believe your EBT card may have been used by someone else. Please call the number on the back of your card (888-123-5555) to cancel and get a new one. If you need a new card immediately, please visit your local office.

Use texting to share timely information, provide critical status updates, or remind someone to do something.
Examples:
- Your application is due on...
- We need more information from you to process your application for...
- We will be calling you about...at...
- We are seeking your feedback on/participation in...

Texting is **not great for** long, detailed instructions or frequent reminders that may be ignored.
Examples:
- Your rights and responsibilities
- How to complete your application
- Weekly reminder not to share your account information

Your program may already be communicating with your audience through methods like mailed notices and phone calls. Think of text messages as complementary to your existing communications. Review how well you are currently reaching your audience. Are there methods or gaps that could be supplemented with a text message?

The Department of Veterans Affairs provides a [helpful flow-chart](#) that can help you decide if a text message is needed for the communication problem you are trying to solve.

Use a hypothesis framework as you plan your campaign

Think of your texting campaign as a scientific experiment, and try to articulate what you hope to improve as a result of implementing text messaging at your agency. For example:

- We believe that texting [specific group of people] when [this happens or on this cadence] to inform/alert them about [subject] will result in [desired action].

Review your drafted hypothesis with your team to make sure everyone is aligned on your desired goals. A clear and concise hypothesis can help you decide how to [write text message content that provokes action](#).

Begin with a small test

To help you decide how much to invest in text messaging over time, we highly recommend starting small and testing your message campaigns to refine based on feedback and evidence.

Starting small has less risk and more flexibility. It can help you gather data and decide *if and how* to send more text messages. For example, start by sending one message to a smaller sample of your audience and track their resulting behavior.

At a minimum, make sure to get feedback on your message content from staff, community-based organizations, and, ideally, from people who receive the texts themselves to ensure your messages are clear and actionable.

Measure performance

Building and operationalizing a texting initiative requires time and effort, and you want to be able to demonstrate the results of that effort. To understand if your texting program is successful, ask:
- What do you want to be *different* for your program or your desired audience after a text message is sent, as compared to your current state?
- How will you *know* if text recipients take the desired action?
- Do you have access to existing data in your system that you could use to determine whether texting is giving you the results you want?

Follow rules & regulations

Understand what is required when texting the public.

What to know about consent and opting out

Providing consent and opting out are key ways for text recipients to express their text communication preferences. Discuss your obligation to obtain consent with your legal counsel.

If you do need expressed consent, consider including a pre-checked plain language opt-in (i.e. "It's OK to text me.") on digital forms. Be sure to ask for an up-to-date phone number and include a question about the recipient's preferred language for text messages if you expect to translate your text messages in languages other than English.

Complying with the Telephone Consumer Protection Act (TCPA)

The Telephone Consumer Protection Act (TCPA) (47 USC § 227) is the federal law that impacts how organizations are allowed to communicate in bulk with the public via telephone (including text message or SMS).

The FCC has ruled that **Federal** and **State** programs are exempt from the TCPA and can send text messages to the public without consent if conducting official business. Without explicit mention in the ruling, local governments, phone carriers, or any texting intermediaries might require it.

Download and share our overview of the TCPA with your legal counsel. It provides a baseline interpretation to aid your legal counsel in getting up to speed with what might be needed for your program or use case. For additional questions about the enforcement of the TCPA, you can watch a recorded training on public benefits texting provided by the FCC.

Opting out

There is no policy requirement for senders to communicate opt-out options, but including instructions in introductory and/or auto-response texts on how to opt out and opt back in are effective ways to establish trust with your audience.

In the US, no matter where texts are coming from, a recipient has the right to revoke consent at any time through any reasonable means. For example, a text recipient can always opt out of receiving text messages from a phone number by responding "STOP", "QUIT", or one of several other keywords.

Any subsequent messages sent to that number will be blocked by the phone carrier and not delivered. We recommend establishing an internal process to obtain and remove numbers that fail multiple times to avoid continuing to send messages to them.

[noted on 10/01/24: should we include more information here from the FAQs doc? There's more detail there that covers consent

Honoring privacy

Phone numbers are personally identifiable information (PII)

When putting together the data spreadsheet (or CSV) file containing text message data, follow relevant security processes for storing and transmitting the file that contains PII.

Don't text sensitive information

When using Notify to communicate with the public, remember to not disclose sensitive information through texts. Consider how the message isn't being sent to a phone number, and once it's open the content within should be respectfully informative but protective of the person who receives it.

Sensitive information should be protected and secure. Social Security Numbers, driver's license numbers, personal health information, and passwords are all sensitive PII that should not be shared via text message. Consult with your privacy office to understand what information you can and cannot include in a text message. Different programs and jurisdictions may have different rules and interpretations.

Assess risk

Consider the risk of someone who is not the intended recipient, receiving the text message. Establish an internal process to keep your phone number list up-to-date. The FCC offers a [Reassigned Numbers Database](#) to identify phone numbers that may have been reassigned since your agency obtained them.

Establish trust

Help your audience anticipate and welcome your texts.

People are wary of texts they're not expecting to receive. Before you send your first text, consider how you will gain trust with your audience and address any concerns of spam. Seize specific moments to reinforce what your audience should expect from your messages.

Get the word out

Before you launch, let your audience know you are adding texting as a communication method. People are more likely to trust your text once they get it if they know that your program is sending texts.

How you currently communicate with your audience will determine the best approaches to announce your new initiative. Harness channels you're already using like social media, public websites, mailing inserts, or fliers at key service locations as well as partnering with community organizations to get the word out about your new texting program.

An example of key messages in direct mail

Keeping track of your SNAP renewals just got easier!

CT DSS: Hi, we have some news! In 2023, we will start sending text messages to help you manage your SNAP benefits. You could get your first text message in the next 2 weeks.

In 2023, the Connecticut Department of Social Services (DSS) will text you reminders to submit your renewal form to help you keep your SNAP benefits.

- **We will always text you from an official DSS number**: the DSS Benefits Center number (855) 626-6632 or a 5-digit number
- **We will never ask for your SSN or EBT PIN**
- Stop the messages by replying "OptOutSNAP"

Check we have your cell phone number by going online to:
www.mydss.ct.gov

Connecticut Department of Social Services

TEXTING ENG/SP 2022

Prime your audiences to trust you

To reinforce legitimacy, include these key messages in your outreach:

1. **Introduce yourself –** Give people time to get to know your texting communications before you need direct action from them
2. **Phone number** – Note the sending phone number your texts will come from
3. **Text types** – Be clear on the types of texts you intend to send, how often, and why they matter
4. **Privacy policy**– For example, state that you will not collect personal information, including the types of information you will never ask for
5. **Places to verify** – Include a phone number, website, or human where people can verify that the texts are coming from you
6. **Opt out** – Provide opt-out instructions and a disclaimer for the potential cost of receiving the text

Depart of Social Services: Welcome to text updates from the (1) **Department of Social Services**. (2) **We'll always text you from this number**, save us to your contact list. Our goal is to (3) **keep you up to date on your account status.** (4) **We will never ask for personal details in a text.** (5) If you have questions about how we protect your privacy, see state.gov/privacy. (6) **Reply STOP to stop.**

As people receive texts

When a person has questions or needs assistance, reaching out for support may be natural for them. Give direction in your texts so your audience understands what to do with the information you provide. Remember, it's important to repeat consistent and standardized language across texts and programs.

Be trustworthy

7. Identify yourself in the text message. Use a consistent and familiar **program name** to precede each text you send.
8. Personalize with **first name**. Through A/B testing, Code for America saw an increase in follow-through by 25% if someone's first name was included.
9. Use **full and direct .gov website URLs**. Avoid link shorteners, as they obscure your links and potentially make it easier for a malicious actor to spoof your text.
10. If providing a phone number, use a familiar phone number and **provide information on how to verify** its legitimacy.

(7)**Dept of Social Services**: Hi (8)**Julie**, Your Medicaid renewal is closing December 31, 2023. You can renew online at (9)**https://www.application.yourstate.gov** or (10) **call the number on the back** of your Medicaid card**.**

Provide helpful auto-responses

If you're sending one-way notifications, phone carriers allow a single auto-response message that will be generated if a recipient tries to text a response to your message. Use the auto-response to reaffirm your key messages around legitimacy and communicate to recipients that texts are coming from an automated system.

11. Provide a way to contact a human in any auto-response text
12. Provide information on how to opt out and opt back in

Dept of Social Services: This number is unmonitored. To (11) **contact us, call 888-123-4567**. We will never ask for personal details in a text. If you have questions about how to protect your privacy, see state.gov/privacy (12) **Reply "STOP"** to this phone number to opt out of receiving texts, and "START" to opt back in.

Be prepared for questions

Your texting program will only be perceived as legitimate if you get the word out in many different ways. It's also important that agency employees who support text recipients (for example, the call center) are familiar with the texting program. They can accurately respond

to recipient questions about them, so make sure you're priming your delivery staff, especially those who interact directly with your intended audience.

Harness trusted communication channels

Websites

Post banner alerts about texting on your agency website and link to a press release for more information. Publish a public texting privacy policy.

Community organizations

Alert trusted community-based organizations that texts are coming and what they look like. Equip them with fliers, posters, and talking points to spread the word.

IVR / Call Centers

Consider adding hold message announcements about your texting initiative to further get the word out.

Prepare your team

Staff

Give all staff a heads-up about texts before and when they are sent.
Share talking points on what texts you're sending, when you'll start to send them, the phone number they are coming from, and where staff can escalate any issues.

Case management systems

When it makes sense, include information about texts being sent to specific people on individual splash pages or within case management notes.

Write texts that provoke action

Help your audience know what to do with the information you send.

When writing a text, focus on the person who is going to receive the message and write it for them. Use plain language and provide easy to understand next steps.

Placed inside blue box // When deciding what types of messages to draft for your campaign, think through the following questions:
- What do you want recipients to *do* when they receive the text?
- What will happen if a recipient doesn't take the action you want them to take?
- Will you send any follow-up texts depending on if the action was taken or not?

Be clear and concise

- **Use simple, everyday language.** Keep the text short and clear. Stay under 300 characters.
- **Say only one important thing per message.** Focus on the most essential instructions and information. If there are multiple actions you want someone to take, consider sending a series of well-timed messages.
- **Use a neutral, direct, and professional tone.** This works better than a friendly or overly casual tone**.**

Build conditions for action

- Clearly state the information and the **response you want the recipient to take.**
- **Point directly to where the action can be completed**, not to more information.
- Make sure the **action can be completed via mobile** phone, like calling a person or going to a mobile-friendly URL.
- Include at least two **options for a recipient to take action**. Some recipients may be more comfortable talking directly to a person, while others may prefer a web-based experience.
- **Consider clearly explaining any consequences** if the desired action is not completed.

State Medicare Agency: Hello, MEDICARE has attempted to send you an update about your claim, but the mail was returned. Please go to https://www.medicare.gov/account/login?utm_source=TEXT, log in to your account, and click "My Account Information" to verify that your address is correct. If you are having difficulty logging in, call 1-800-MEDICARE for assistance. We will attempt to send the mail again in 14 days.

What provoking action looks like

Evidence shows that employing behavioral science is an effective way to increase the likelihood of a recipient taking action upon receiving your text. Keep in mind these three foundational principles while drafting your text message:

Feeling a sense of ownership can influence behavior.
Example – **Don't miss this chance to get free internet** or $30 per month off your internet bill.

Individuals are strongly influenced by others' behaviors.
Example – **Thousands of residents** already get an average of $113/month in money for food.

Individuals perceive losses more powerfully than gains.
Example – Contact us for potentially unclaimed free internet services **that belong to you**.

Text in multiple languages

What to know as you plan translated texts.

Sending messages in recipients' preferred language demonstrates respect, makes it more likely that recipients will understand and take action on the message, and may be required by your agency or program.

To [send translated messages using Notify.gov](#) you will need two things: a record of your recipients' preferred language and translation/s of the message template. Notify.gov does not provide translation services.

As with messages in English, we strongly recommend user testing the translations with people who speak the language to ensure the messages are understandable.

Ensure texts say what you mean

A dictionary tells us what a word means, but a nuanced message helps people, with seasoned mental models, understand what we are communicating.

Create content that conveys the same core meaning in any language the message may send in, beyond English. Or consider AI tools with nuance translation capabilities, such as ChatGPT or Gemini (not just Google Translate / dictionary translation).

Note: people who receive translated messages should be directed to opt out by replying "STOP" in English, even though the message is translated.

Test your multi-language messages

Keep in mind, a phone's technology may determine what is seen regarding words or characters. Test your messages on phones set to receive in the message's language.

And, whether you use your normal vendor, process, or people to translate, test your message with native-speakers, optimally, among those who may receive your messages.

Measuring performance with benchmarking

Learn how effective your texting program can be.

Several factors determine a messaging campaign's success, but the performance of previous projects can help set expectations. Get to know what other government texting initiatives have done as a way to benchmark [your own performance](#).

What other texting studies have found

When the [Center on Budget and Policy Priorities studied WIC](#), they found key learnings about the quantity of messages delivered, how people engage with messages, and how they take action.

Message delivery

Benchmark: 80% of texts are successfully delivered
- You may discover that some numbers are temporarily or permanently unavailable due to service being discontinued, numbers changing, or being a landline.

Engagement

Benchmark: Engagement rates with texts ranged from 17% to 26%
- The highest rate of engagement with a text comes within hours of sending. Engagement rates include any kind of action taken due to a text, including replying "STOP" to prevent future texts.

Appointment requests

Benchmark: Requesting appointments after receiving texts ranged from 4% to 9%
- Requesting appointments is a specific type of engagement. Provide a phone number or link to an online appointment request form.

The [Code for America's Texting Playbook](#) reported specific learnings around appointment reminders, completing document submission, and maintenance reminders.

Appointment reminders

Benchmark: People were 79% more likely to keep their appointment after receiving a text reminder.
- You will likely see more completed appointments.

Benchmark: People were 55% more likely to complete an interview after receiving an interview reminder
- You will likely see more completed interviews.

Document submission

Benchmark: People were 6% more likely to complete document submission after receiving a customized list of required documents via text
- To encourage response, provide a custom list of the needed documents and information about how to submit them.

Reminders

Benchmark: Text reminders improved case maintenance rates by 21%
- You may see less turnover in your case rates.

Appendix: Review process

Section landing = top-level navigation page to enter this

ref#	Page Name	Page Type	Action	By who	Status	As of
1	Guidance	Section landing	Drafted	Deana	ready	8/8
			Edit 1	Deana	ready	8/12
			Review 1	Em	ready	8/13
			Edit 2	Deana	complete	8/19
			Review 2	Cathy	complete	8/21
			Edit 3	Deana	Fact checking	8/28
			Review 3	Steve, Elizabeth		
			Final Edit	Deana, Molly		
			Approve & Freeze	Em		
1	Establish clear goals	Category landing	Drafted	Deana	ready	8/8
			Edit 1	Deana	complete	8/12
			Review 1	Em	complete	8/13
			Edit 2	Deana	complete	8/14
			Review 2	Em	done	8/15
			Edit 3	Deana	assigned	8/19
			Review 3	Cathy	complete?	8/21
			Edit 4	Deana	proofed	8/27
			Review 4	Steve, Elizabeth	*ready*	8/28
			Final Edit	Deana		
			Approve & Freeze	Em		
2	Following rules	Category	Drafted	Deana	ready	8/7

	and regulations	landing	Edit 1	Deana	complete	8/12
			Review 1	Em	complete	8/14
			Edit 2	Deana	complete	8/16
			Review 2	Cathy	complete	8/21
			Edit 3	Deana	ready	8/28
			Review 3	Steve, Elizabeth		
			Final Edit	Deana		
			Approve & Freeze	Em		
3	Establish Trust	Category landing	Drafted	Deana	ready	8/7
			Edit 1	Deana	complete	8/13
			Review 1	Em	complete	8/14
			Edit 2	Deana	In progress	8/16
			Review 2	Em	complete	8/23
			Edit 3	Deana	assigned	8/29
			Review 3	Cathy	complete?	??
			Review 4	Elizabeth, Steve		
			Final Edit	Deana		
			Approve & Freeze	Em		
4	Write texts that provoke action	Content	Drafted	Deana	complete	8/7
			Edit 1	Deana		8/14
			Review 1	Em		8/15
			Edit 2	Deana	complete	8/16
			Review 2	Cathy	complete	8/21
			Edit 3	Em, Deana	complete	8/28
			Review 3	Steve, Elizabeth		

			Final Edit	Deana		
			Approve & Freeze	Em		
5	*How to write effective messages*	*Content*	Info gathering	Deana		8/20
			Edit 1	Deana		
			Review 1	Em		
			Edit 2	Deana		
			Review 2	Cathy		
			Edit 3	Deana		
			Review 3	Steve, Elizabeth		
			Final Edit	Deana		
			Approve & Freeze	Em		
6	Text in multiple language	Category landing	Drafted	Deana	complete	8/9
			Edit 1	Deana	complete	8/9
			Review 1	Em	complete	8/14
			Edit 2	Deana	complete	8/16
			Review 2	Cathy	complete	8/21
			Edit 3	Deana	proofed	8/28
			Review 3	Steve, Elizabeth		
			Final Edit	Deana		
			Approve & Freeze	Em		
7	Measuring performance with benchmarking	Category landing	Info gathering	Deana	complete	8/8
			Drafted	Deana	ready	8/12
			Edit 1	Deana	complete	8/15
			Review 1	Em	assigned	8/15
			Edit 2	Deana	complete	8/19

			Review 2	Cathy	complete	8/21
			Edit 3	Deana	proofed	8/28
			Review 3	Elizabeth, Steve		
			Final Edit	Deana		
			Approve & Freeze	Em		

Notes from user feedback:
- Need a section on SOPs / operationalizing your campaign
  - Could include campaign sending process + campaign planning template
- Translation is way more nuanced than our current best practices