

# Text Campaign Planning

This is a generic planning document for a government text messaging campaign. Each agency and campaign is different, so adjust according to your needs. This is a simple overview of a manual texting process, additional steps would be required if automating your program by connecting a texting tool with an internal application.

## Prepare-to-send Checklist

- ☐ Any required **internal security reviews / approvals** are complete
- ☐ **Auto-response text** has been finalized and approved as necessary
- ☐ **Message text** has been finalized and gone through any required internal approvals
- ☐ Message **sender has been trained** on how to send messages
- ☐ Partner conducts **final sending test** within their text product
- ☐ To increase trust in texts, **outreach is conducted** to tell potential recipients they may receive texts
- ☐ **Internal staff** who need to be aware of the texts (customer service, call centers, leadership, communications staff, etc.) have been informed texts will be going out, who they will be going to, and what to tell recipients or media with questions
- ☐ **Process in place to track** who has been texted, whether texts were delivered, whether recipients opted out, and whether and when recipients took desired action/s (to assess campaign effectiveness)

# Worksheet

## Basics

<b>Campaign Name</b>	
<b>Point of Contact</b>	
<b>System Admin</b>  Person who will be in charge of the texting application access for the campaign, if different than the Point of Contact	
<b>Consent Review and Processes</b>  Do you need or want to get explicit consent from your audience prior to texting?  <i>Government agencies texting government program participants are generally not required to do so.</i>	

## Goals and Evaluation

<b>Audience</b>  Who do you want to text?	
<b>Audience Segmentation (if applicable)</b>  Any filtering or sampling you want to do of the group (e.g. exclude those with xyz, use a random sample of the audience, etc.)	
<b>Trigger</b>  When do you want to text them? Not a date, but what will trigger sending messages.	

<b>Desired Action</b>  What action do you want the audience to take?	
<b>Impact Assessment</b>  How will you measure whether recipients took the action / impact of the messages?	

## Data and Logistics

<b>Approximate size of audience / audience segment to be texted</b>	
<b>Data source for audience phone numbers and other variable data</b>  Where will you get the audiences' phone numbers (and other variable data, if applicable)? Remember: if translating messages you'll need a way to identify which messages to translate.	
<b>Segmentation</b>  How will you identify our specific audience's phone numbers (what variables, filter values, etc. we will use)?	
<b>If applicable, who will be responsible for generating the phone number bulk upload?</b>  If you are bulk uploading a list of phone numbers.	
<b>Where will the upload file be saved?</b>	

It's important to know where your data file for phone numbers is saved, if different people are generating vs. uploading.	
<b>How often/frequently will messages be sent?</b>  One time, daily, weekly, monthly, ad hoc, other	
<b>When do you hope to send your first message?</b>	
<b>Who will be the message sender for your program?</b>  Who will push the send button?	

## Content and Outreach

<b>If applicable, Service name</b>  Messages may start with an indicator of where they come from, for example, "WI EBT:..." This should be something that recipients understand.	
<b>Message text</b>  Include personalization in ((parentheses)) or whatever is used by your texting application.	
<b>Auto-response text</b>  What will people receive if they try to text back to the message?	
<b>Translation processes</b>	

Will messages be translated? How will you know which messages to translate? Into what languages? How will they be translated?	
<b>Recipient outreach mechanisms</b>  How will you inform potential recipients that they may receive texts / increase trust in texts?	
<b>Internal outreach mechanisms</b>  How will you inform staff who may get questions about the texts?	