SELECTING AN SMS PROVIDER THAT MEETS YOUR BUSINESS REQUIREMENTS
Proactive communication strategies are key in keeping up with consumers’ on-the-move lifestyles, but a variety of factors can make them a real business headache if you aren’t careful. **Ensure you have a firm understanding of the relationships behind your SMS/text messages, and use this checklist to help clarify your outbound solution criteria before selecting a partner.**

Here’s what you should know:

**Carriers** (otherwise known as providers or operators) like Verizon or Sprint provide the network through which brands like yours establish connectivity with customers. Each carrier has unique guidelines brands must follow before delivering SMS/text messages to customers’ mobile devices. It's easy to see how partnering one-off with each carrier would get complicated in a hurry. That’s where aggregators come into play.

Acting as the “middle man” between application providers and all wireless carriers, **aggregators** provide a gateway for application providers to send and receive messages and content across every carrier compliantly. Since all SMS traffic must go through an approved aggregator in order to reach the carrier networks, partnering directly with an aggregator can seem like an attractive choice for some enterprises — especially those leveraging simple one-way outbound solutions.

#1 **MISTAKE** organizations make is not understanding their future requirements for SMS

#2 **MISTAKE** organizations make when selecting an SMS provider... Choosing solely based on price
But connecting directly to an aggregator requires a breadth of specific technical know-how, so brands that need more dynamic, two-way interactive or personalized SMS/text messaging strategies, rely on the consultation of full-service providers.

A managed service provider, like West, partners with multiple aggregators to provision short and long codes and program briefs to provide brands with unmatched global SMS coverage. They help companies shift beyond one-way blast notifications and can facilitate a connected ecosystem for notifications, world-class compliance, business intelligence and analytics expertise and continuous improvement—ensuring the end customer receives the truly personalized experience they demand. So while carriers, aggregators and managed providers can do some of the same things, they are certainly not created equally. Review table 1 for insights into the primary differences.

You need a partner that understands your goals, knows your market and has the broad technical expertise to ensure stability, compliance and adaptability in an ever-changing consumer-driven world. West has 30 years of cross-industry experience building and orchestrating proactive communication solutions, using data to optimize performance and ROI.
The below table highlights key areas to consider when looking for an SMS provider

<table>
<thead>
<tr>
<th>Table 1</th>
<th>West (Managed Provider)</th>
<th>Aggregator</th>
<th>Carrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program brief consultation, management, completion and addendum evaluations</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Short and long code terms and conditions web page creation and/or management</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Data scrubbing such as:</td>
<td></td>
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<tr>
<td>• Ported/Disconnected Scrub</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>• Cell Number Check: DMA Wireless Block Identifier™, Wireless Ported Number List and Client Deliverable available</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>• Do Not Call scrubbing: Federal DNC, Customer DNC and State DNC</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>White and Black list</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Carrier lookup</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Free to End User (FTEU)</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Throttling and Pacing</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Delivery windows</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>One-way SMS blasts</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Two-way Automated SMS replies</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>SMS Natural Language (automated conversation interaction)</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>SMS Chat (Agent-supported SMS interactions)</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Ongoing engagement strategies</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Customer opt-in and adoption strategies and expertise</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

*Table continued on next page*
Here are some considerations to help clarify your outbound solution criteria:

**Multi-Channel**
- Are you only exploring a single-channel blast approach?
- Will you reach your target audience and receive your intended response this way?
- Have you thought about how voice, SMS and email can work together?

**Preference Management**
- Do you empower your customers to interact according to their personal preferences by specifying, for example, channel, type of message or time of day?

**Campaign Management**
- Do you have multiple functions across your enterprise that need to manage outbound campaigns? Do you need greater cross-channel visibility and control?

**Campaign Strategy**
- Do you need to administer notifications multiple times, over several days, or for multiple jurisdictions?
- Do you need a strategy to document call attempts and delivery failures and drive continuous improvement?

**Bi-directional**
- Are you sticking to one-way messages or seeking customer responses?
- Would it help to use proactive alerts to decrease inbound calls?
- Do you need to integrate specific IVR or SMS applications to monitor the response?

**Pacing**
- Do you need to stagger your notifications to avoid lunch hours or to alleviate call center volume during high-traffic times?

**Pre-processing Data**
- Is the customer data you’ve collected “clean” – accurate, relevant and complete?
- Do you need to segment your customer base into smaller, more specific groups?

**Data Scrubbing**
- Do you know which phone numbers are landlines and which are cell phones?

Consumers demand that you keep up with their on-the-move lifestyles. Proactive communication strategies are key, but there are many factors that can make them a real business headache if you aren’t careful.

### Table 1 continued

<table>
<thead>
<tr>
<th>Service</th>
<th>West (Managed Provider)</th>
<th>Aggregator</th>
<th>Carrier</th>
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<tbody>
<tr>
<td>Message composition and expertise for customer personalization</td>
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<td>●</td>
<td>●</td>
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<tr>
<td>Multi-channel, connecting all your communications channels regardless of vendor or technology</td>
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<td>●</td>
<td>●</td>
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<tr>
<td>Enterprise-wide visibility across channels and context awareness</td>
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<td>●</td>
<td>●</td>
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<tr>
<td>Customer communication preference management</td>
<td>●●●</td>
<td>●</td>
<td>●</td>
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<tr>
<td>Industry Expertise across multiple verticals such as Healthcare, cable/telco, utilities, etc.</td>
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<tr>
<td>Compliance experts</td>
<td>●●●</td>
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<tr>
<td>Business Intelligence and Analytics</td>
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<td>●</td>
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<tr>
<td>Campaign administration</td>
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<td>●</td>
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<tr>
<td>Integration with client or 3rd party back office systems</td>
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<tr>
<td>Managed Support and consultation</td>
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<td>●</td>
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<tr>
<td>Wide array of professional services such as customer journey assessment and application development</td>
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<td>●</td>
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</table>

### Are You Considering Everything Before Choosing an SMS Partner?

Use this checklist to help clarify your outbound solution criteria before selecting a partner.
EXPLORING THE IMPACT OF WEST’S PROACTIVE SOLUTIONS

Below are just a few of the capabilities West offers, allowing you to focus on your core business.

**Notifications Platform**
- Standard-rate and free to end user (FTEU) messaging
- Domestic and international support
- Integration with other channels, including email, fax, voice and mobile push

**Compliance**
*Client ultimately responsible for customer consent, therefore West has solutions to help them manage*
- West compliance experts
- Consent expertise
- Opt-in and adoption strategy
- Collect and manage through Preference Management
- Opt-out management
- Ported/disconnected scrub
- Cell Number Check - DMA Wireless Block Identifier™ and Wireless Ported Number List
- Client database cleansing services
- Do Not Call scrubbing: Federal DNC, customer DNC and state DNC
- Message Flow
- Right-party verification for privacy
- Disclosures
- Opt-out response options

**Campaign Administration**
- Scheduled and ad-hoc campaigns with rapid deployment
- Opt-in/opt-out database and automated solutions for voice, SMS, push notifications and email
- Pre-processing filters
- Data integration and cleansing
- Enterprise-wide visibility and context awareness
- Configuration of throttling, contact order, retry strategies, etc.
- Real-time monitoring and updates
- Cradle-to-grave reporting
- Intelligent dissemination or manual control capabilities
- User-friendly dashboard

**One-Way & Conversational SMS**
- Automated standard and custom replies
- All languages supported by UCS2 character set
- Natural language capabilities
- Integration with client or 3rd party systems
- Preferred agent routing with SMS chat
- Agent-supported interactions when more complex issues arise through SMS Chat
- Message composition
- International SMS support

**Preference Management**
- Unlimited contact and preference information storage
- Single source of truth
- APIs to integrate with existing portals
- Subscription services that issue alerts when preferences are updated

**Professional Services**
- Customer journey assessments
- Outreach strategy development
- Application development
- Data analysis and predictive modeling

**Managed Support**
- Automatic upgrades to cloud-based software
- 24/7x365 monitoring and support
- Pre-production testing environment
- Application lifecycle management
- SMS Carrier and vendor management
- Training documentation and execution
- Program brief consultation, management and completion
- Program brief addendum evaluations
- Short and long code management
- Short and long code terms and conditions web page creation and/or management
- Client compliance and program consultation
ABOUT WEST

West delivers communication solutions that help brands create connected customer experiences. We have 30 years of experience strategically improving customer interactions, enhancing productivity and increasing profitability, with clients in healthcare, education, utilities and diverse commercial industries. West’s Interactive Services solutions include IVR & Self-Service, Proactive Notifications & Mobility, Cloud Contact Center and Professional Services. Experience Connected at west.com/interactive.

West was recognized for our innovative proactive notifications suite by Frost & Sullivan