

Your Checklist For Choosing an SMS Provider

We've done the research, so you don't have to.

Simplify your search for an SMS provider that will support your growth over the long term. Use this easy-to-reference checklist to ensure your partner checks off on these 10 key areas.

1. Easy set-up & launch

- ✓ Provides strategic support for getting your program launched, including your sign-up flow and welcome offer strategy.
- ✓ Provides guidance, training, design and development resources, and learning opportunities.
- ✓ Has a close relationship with carriers, and focuses on reliable deliverability.

2. Guidance on compliance

- ✓ Has the expertise to help you navigate SMS-specific laws so you remain compliant at every step.
- ✓ Recommends that you use a 5-6 digit short code, toll-free number, or A2P 10-digit long code (vs. a standard P2P 10-digit long code).



Standard P2P 10-digit long codes are no longer permitted for sending marketing messages, according to US cellular carriers.

3. Integrations that connect with your tech stack

- ✓ Has seamless integrations that make it easy to connect to the rest of your marketing stack, including your e-commerce platform, ESP, CDP, CRM, etc.
- ✓ Lets you centralize and access the data from your tech stack to send more relevant texts.

4. List growth tools

- ✓ Offers multiple list growth tools that allow you to grow your subscriber list across channels—both online and offline.
- ✓ List growth solutions are automated and optimized.



Manually opting in subscribers can significantly limit your SMS list growth rate and overall performance.

- ✓ Gives you flexibility to customize the look of your sign-up units, and decide where and when to display them.
- ✓ Sign-up unit templates are built with ADA and TCPA compliance in mind.

5. Sophisticated campaign message-sending workflows

- ✓ Lets you schedule and send one-time campaign messages.
- ✓ Text messaging campaigns can be A/B tested and optimized.
- ✓ A/B test performance can be accessed in real time, and results can be used to improve future messages.
- ✓ Lets you segment campaign messages, so you can reach subscribers with more relevant content.

6. Media options including SMS, MMS, and video

- ✓ Offers the ability to include images, GIFs, or videos in your messages.
- ✓ Has built-in A/B testing functionality so you can understand how subscribers engage with different types of media.

7. Personalized triggered messages that engage subscribers across lifecycle

- ✓ Has built out triggered messaging flows, including welcome messages, browse and cart abandonment reminders, post-purchase messages, and transactional updates.



These types of messages help ensure you reach your subscribers at the right time with personalized content. Plus, once these messages are set up, they'll send automatically.

8. Real-time, two-way conversations

- ✓ Allows you to have 1:1 conversations and build real connections with your subscribers using automated or people-powered text messaging replies (e.g. keyword-driven journeys for contextual replies or human agents to scale interactions that need a more personal touch).

9. Personalization and targeting tools

- ✓ Provides out-of-the box targeting capabilities that integrate with your tech stack.
- ✓ Offers advanced segmentation functionality using data such as purchase history, message engagement, location, shopping behaviors, etc.

10. Reporting and analytics

- ✓ Has out-of-the-box reporting so you can see what's working with your SMS channel.



At a minimum, you should be able to see subscriber growth (by source), message engagement (and opt-out reporting), and revenue attribution.

- ✓ Lets you set up custom reports or pull ad-hoc reports.
- ✓ Lets you schedule reports to be sent to you on a recurring basis.



This can be helpful when sharing insights about your SMS program with key stakeholders.



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