



Checklist for Sending Compelling and Legitimate Texts

- ☐ Have clear message goals and communicate thoughtfully
 - ☐ Prioritize **timely reminders or updates**
 - ☐ Frame messages to **encourage action**
 - ☐ **Don't amplify stress** and prioritize safety
 - ☐ Use **behavioral science** to increase follow through
- ☐ Create trustworthy and legitimate messages
 - ☐ Clearly identify the **sender** and purpose of the messages
 - ☐ Only use **full URLs** or branded short links
 - ☐ Include **opt-out** instructions in messages
 - ☐ Keep your messages in a **consistent format**
 - ☐ Have an **auto response** that points to **who you are** and how to **get in touch**
- ☐ Reinforce legitimacy holistically
 - ☐ Inform **clients, staff, partners, and vendors** that you're sending text messages and **how to verify they're legitimate**
 - ☐ Send a **mailer** to clients
 - ☐ **Update your website and IVR** to say what + when you'll start sending
 - ☐ Plan for the **timing** of the message to **align with client expectations**
 - ☐ **Check for consistency** in message language across programs