

# Preparation checklist for sending communications



Before you need to send any important (and potentially urgent) messages, we recommend you make some time to adequately prepare your data, content and overall strategy so that you are ready to send when the time comes.

## Prepare your data

- Collate and clean contact data
- Standardise data fields, including contact number formats and name capitalisation
- Create contact lists based on unique segmentation needs

## Prepare your message

- Prepare any dynamic content (e.g. information that changes for each segment of contacts)
- Make sure you have the correct account features active (e.g. URL shortener, MMS etc.)
- Create and save a message signature (ensure it includes an identifier)
- Check local legislations around opt-out requirements
- Check any personalisation settings (e.g. making sure the field references in your message are correct)
- Check character count and volumes (1 SMS = 160 standard characters max.)

## Prepare your account

- Set up Automations as required (e.g. automated responses, forwarding rules etc.)
- Check credit limit and credit balance are sufficient (if pre-paid)
- Check plan allowance is sufficient for message volume (if post-paid)
- Send a test message to a seed list

## Start to send

- Schedule your send as required (check recipient time zones and local legislations)
- Stagger your message send (if required)
- Send your messages