

CHECKLIST

# Choosing an Enterprise Platform to Scale Your Email and SMS Marketing

**attentive**<sup>®</sup>

Use this checklist as a guide to help ensure the vendor you're evaluating can support your needs.



## Migration and onboarding

**What you're assessing:** If the platform can seamlessly handle the migration and onboarding process, ensuring a smooth transition from your current marketing platform with minimal disruptions.

**It should have:** Dedicated resources, such as migration specialists and technical support, to guide you through the entire process and address any challenges that may arise along the way.

### Questions to ask:

- What level of support can we expect during the migration and onboarding process?**

Look for a provider that's willing and able to provide hands-on support every step of the way and won't disappear once you're up and running. Our team will be with you from launch to optimization, so you won't miss any revenue-driving opportunities.

- How long does the migration process typically take from start to finish?**

We've invested in making our migration process quick and easy, and we'll help you complete your migration in days rather than months.

- What kind of ongoing support and resources do you provide after the migration and onboarding process is complete?**

Our Client Strategy team will be there post-migration to help with anything you need, whether it's quick answers to your questions or recommendations for optimizing your program.



## Scalability and reliability

**What you're assessing:** If the platform can accommodate your company's current scale, growth, and evolving marketing goals.

**It should have:** Robust and proven infrastructure to handle a large volume of data, messages, and interactions without compromising speed or performance.

### Questions to ask:

**How many messages did your customers send last year?**

You're looking for a platform with a delivery network that can handle billions of messages per month. We regularly stress-test our platform so everything runs smoothly, and we have a large on-call team to help manage any issues that come up.

**How does your deliverability work?**

Attentive works with over 80 carriers across the globe to help support our message load, and we have a dedicated deliverability team that proactively monitors for potential issues.

**Can you share insight into any downtime or outages you experienced during BFCM?**

You're looking for a platform with a proven track record of delivering messages reliably, especially during high-traffic periods. We prepare months in advance for peak holidays like BFCM. Over Cyber Week 2023, our 8,000+ customers sent more than 2.2 billion messages.

**What's your average time to value for customers? How quickly can we expect to see results?**

Brands using Attentive SMS experience a payback period of less than six months.

**What kind of revenue impact and ROI have your customers achieved?**

Make sure to ask for case studies and other data to understand what kind of results you should expect. Brands working with Attentive SMS can achieve an ROI of 181%.



## Targeting and segmentation

**What you're assessing:** If the platform can accurately identify and target your ideal audience with highly relevant content.

**It should have:** A strong identity solution that recognizes more of your website visitors using their email address and phone number, so you can create hyper-personalized campaigns and triggered flows.

### Questions to ask:

- How does your identity solution work? What data point do you use as a unique identifier?**

Our phone-number-based profiles take the guesswork out of identification and personalization.

- Can you recognize visitors across channels and devices?**

Attentive recognizes over 1 billion email addresses and phone numbers across devices.

- How will the deprecation of third-party cookies impact your identity?**

Our mobile-first identity uses first-party data, not third-party data, to recognize your website visitors. With every sign-up, Attentive builds a rich identity of the subscriber, including their phone number, email address, browsing and purchase behavior, device type, and more.

- What data can you gather to build comprehensive customer profiles?**

You can bring all the zero- and first-party data you collect through email, SMS, and integrations into the Attentive Consumer Passport to build a complete picture of every customer.

- What kind of segmentation options do you offer?**

You should have access to a library of pre-built segment templates, plus the flexibility to create your own.



## Analytics and reporting

**What you're assessing:** If the platform has flexible and user-friendly reporting tools to analyze your program's performance and focus on the metrics that matter the most to your business.

**It should have:** Comprehensive and customizable analytics and reporting built into the UI, so you can easily drill down and identify trends and opportunities to take your ROI to the next level.

### Questions to ask:

- Does your platform provide real-time analytics, allowing us to track message performance and make data-driven decisions on the fly?**

Our platform can handle massive datasets efficiently and deliver reports with fast loading times, even for complex queries and large user bases. You can also add custom tags to each campaign message for better organization. Then, filter for one or more tags when running reports to track and analyze campaign performance at a more granular level.

- How customizable are the reports? Can we tailor them to our specific goals and KPIs?**

Our analytics and reporting tools are designed to be user-friendly and customizable. You can work from pre-built templates and tailor them to focus on the unique needs of your business. Save them, export them, or schedule them for automatic review later. We also support collaboration across teams and departments with the option to enable secure sharing of reports and insights.

- Can we track customer behavior and performance across email and SMS?**

With our comprehensive UI reporting, you can analyze behaviors across the entire customer lifecycle. The Analytics dashboard gives you a high-level overview of your program's performance, while in-app Reports let you zero in on key metrics and time ranges and track trends over time. You'll have the flexibility to report across email and SMS, dig into individual subscriber data, generate performance snapshots, and more.



## AI-powered automation and personalization

**What you're assessing:** If there are AI-powered tools and capabilities integrated into the platform that expand your team's bandwidth and harness the full potential of your data.

**It should have:** AI model(s) trained on a large volume of quality data points from high-performing marketing messages sent across industries.

### Questions to ask:

**What data is your AI model trained on?**

Attentive AI™ is trained on anonymized insights from 2+ trillion data points, from 78+ billion messages sent across 70+ verticals.

**How can your AI tools help automate our workflows and generate content for email and SMS?**

Magic Message can help you brainstorm and write high-performing SMS copy and email subject lines in your brand voice (and you always have the option to edit the output).

**What kind of suggestions can your AI model make to optimize strategies and performance?**

Our predictive AI tools, like Automated Campaigns and AI Audiences, can help you identify more accurate segments, optimal send times, and the best-performing content.

**What measures do you have in place to protect the data used to train your AI models?**

We have robust data governance and advanced security measures to protect sensitive information. Those measures include:

- Regularly scanning systems for vulnerabilities and patching them promptly.
- Educating our team about cybersecurity best practices.
- Requiring multi-factor authentication (MFA) to enhance account security.



## Compliance and security

**What you're assessing:** If the platform can provide the support, expertise, and resources you need to meet legal requirements and stay compliant.

**It should have:** Built-in guardrails, in-house experts, and any other tools to help you protect your brand from potential risks.

### Questions to ask:

**Do your list growth tools have built-in compliance checks?**

Look for standard flows that use double opt-in, like our patented two-tap mobile technology, and guardrails to help you meet accessibility guidelines.

**How does your platform handle opt-out requests? Are there automatically-recognized opt-out keywords, plus fuzzy opt-out tools that remove subscribers who no longer want to be subscribed?**

The Attentive platform recognizes "stop," "end," "cancel," "unsubscribe," and "quit" as opt out keywords (for international SMS, we recognize translations of officially recognized opt-out keywords). We also have fuzzy opt-out tools that listen for signals that subscribers may be unhappy and remind them how to opt out.

**Do you have tools or processes in place to automatically remove known litigators from subscriber lists?**

Attentive maintains a confidential and proprietary list of over 50K numbers known to be associated with a TCPA, FTSA, or SMS-related lawsuit or claim. The Attentive platform automatically suppresses messages to phone numbers identified as on this list.



## Compliance and security continued

### Questions to ask:

- Are there audit trails in place to help us respond to TCPA (Telephone Consumer Protection Act) complaints quickly and effectively, if needed?**

Attentive maintains a full audit trail for each subscriber's interactions with the Attentive platform, capturing the date and timestamp of their express written consent for opt-in, all sent or received messages, and other relevant information to track sign-ups.

- Do you have a dedicated legal team with extensive knowledge of compliance regulations?**

Our in-house legal team focuses on TCPA, CCPA, CTIA, GDPR, CASL, ADA compliance, and more.

- Do you have relationships with mobile carriers that enforce industry compliance guidelines?**

Attentive is one of the only SMS marketing platforms with a seat on the CTIA board and is a member of the CWTA.



## Unified marketing and tech stack integrations

**What you're assessing:** If the platform can seamlessly integrate with your existing tech stack.

**It should have:** Pre-built integrations to connect your data and orchestrate across tools and platforms, plus flexible APIs or developer resources for building custom integrations tailored to your needs.

### Questions to ask:

- Does your platform have pre-built integrations with commonly used tools and services?**

We offer [100+ integrations](#) with leading tech partners that plug directly into our platform.

- Can your platform integrate with our existing tools?**

Make sure it works with your CRM, ESP, e-commerce platform, loyalty provider, and any other tools in your tech stack.

- Can your platform support custom integrations with proprietary or less-common marketing tools we may be using?**

If we don't have an integration for a specific software or platform, you can use our [open APIs](#) and SDKs to create a custom one. And you'll have the support of our developer team to get it up and running quickly.

- Can you share examples of custom integrations you've successfully implemented for your customers?**

We built a custom 'Perks' API with [one of our customers](#) who doesn't have a standalone loyalty provider. Our platform essentially acts as their loyalty provider, which allows them to segment subscribers based on their membership status and encourage Perks program sign-ups.



## International reach

**What you're assessing:** If the platform can support your efforts to reach and engage audiences in multiple countries.

**It should have:** The ability to deliver messages in multiple languages and to multiple regions. Plus, a team of experts and a wealth of resources to help you navigate the nuances of every country where you have customers.

### Questions to ask:

**Which countries does your platform support sending messages to?**

Attentive's international reach spans 20+ countries across the Americas, Europe, and the APAC region, ensuring you can engage your customers any time, anywhere.

**Can your platform handle multiple languages and character sets to support international messaging?**

With our turn-key solution, you can customize your messages to connect with subscribers in their local language.

**Can we target campaigns and triggered messages based on location and/or send messages to multiple regions simultaneously?**

You can target both campaign and triggered messages by region using our Single-Account Management (SAM) feature. This includes region-based segmentation for campaigns and region-based branching logic in journeys, to ensure customers are receiving the right messages.

**Do you provide dedicated regional support and resources to help us tailor our messages for our audiences in different countries?**

We have a team of regional experts who can advise on localized best practices and make sure your messages are relevant to the local audience.

**How does your platform handle international compliance?**

We provide region-specific compliance tools and guidance, including sign-up units built with localized opt-in requirements in mind. Our knowledge of compliance requirements covers ACMA SPAM Regulations, GDPR, TCPA, and more.



**Want to learn more  
about what Attentive  
can do for you?**

[Request a demo today](#)

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