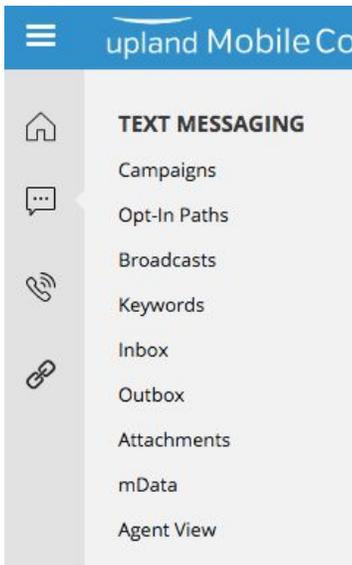




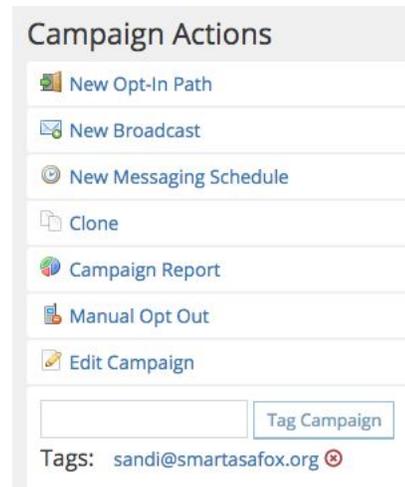
How To (Upland Mobile Messaging) Setup a Keyword Opt-In Path

This “How To” document will cover how to set up a keyword opt-in path that your organization can use to opt-in new subscribers to your mobile program at events or via print, radio and digital ads. We’ll also cover some best practices for selecting keywords and creating your opt-in path.

STEP #1 - Select “Campaigns” in the main menu, under “Text Messaging”



STEP #2 - Click on your campaign or the one that matches subject/goal of your message.



STEP #3 - Select under “Campaign Actions” → “New Opt-In Path”

STEP #4 - Name your “Broadcast” using the naming conventions outlined below:

1. Name → 2. Keywords → 3. Conversation

Name & Type

Name

People will opt-in by

Texting a **keyword to your shortcode** (69238) from their phone.

Any other method such as a **web form** or **CRM sync**.

Cancel

Naming Conventions:

GENERAL: Short Description

- Ex. General Opt-In Path, Volunteer Opt-In Path

EVENT: Event/Conference Name - Opt-In Path - Date

- Ex. MLK Parade - Opt-In Path - 3/10/16

STEP #5 - Select Your Keyword

The keyword section will let you know if a keyword you’ve selected is unavailable.

Keywords

Join Add

is already taken

Keywords

Fox Add

available

When selecting your keyword here are a few best practices:

- **BE CONCISE.** Short and sweet. Ideally one word. No more than two.
 - Ex. AFT2245, TEACHER, EDU, AFT
- **Misspellings & Autocorrect.** Make sure you select common misspellings as keywords and see if your phone autocorrects your keyword to anything and add that as a keyword as well.
 - Keyword = MLK
 - Misspellings = mlk, ml, mkl, mmlk
 - Autocorrect = milk

Keywords

keyword Add

available

Keyword	Created	Updated	Actions
fox	Today at 12:55AM EST	Today at 12:55AM EST	Remove
fix	Today at 12:55AM EST	Today at 12:55AM EST	Remove
fx	Today at 12:55AM EST	Today at 12:55AM EST	Remove
foxx	Today at 12:56AM EST	Today at 12:56AM EST	Remove

Continue

- **NOT Case Sensitive.** Keywords aren’t case SENSITIVE. So if your supporter uses CAPS or lower case letters it won’t matter. (Ie. MILK = Milk = milk)

- **Add homophones.** Just in case people might hear your keyword incorrectly at an event or on the radio (ex. HAIR and HARE).
- **No Punctuation.** Punctuation is not allowed in keywords. If your subscribers text in keywords with punctuation it will not be processed.
- **Spaces and No Spaces.** If your chosen keyword is two words make sure to select options with and without spaces. (Ex. Vote 2019, Vote2019)

STEP #6 - Create your Message Path

To create your message here are a few important things you should know:

- **BE COMPLIANT:** Once the supporter texts your keyword, the first message of your opt-in path will be triggered. This first message is LEGALLY REQUIRED to include the following language:

Reply STOP to quit, HELP for info.
Msg&DataRatesMayApply

- **160 Character Limit.** Basically, your message needs to be shorter than the length of a tweet, and this includes links and your legal compliance language (56 characters). This is very limiting and something you need to think out in advance.
- **Messages Need to Identify the Sender.** You must be clear that supporters are opting into your organization's mobile program. In your 160 characters, you need to identify your organization. This is also a TPC requirement. Here are a few ways this can be done:
 - Start your message with: Welcome to ORG's Mobile Team!
 - ie. Welcome to AFT's Mobile Network
 - End your message with: - Person's name at ORG (ie. -Sandi at PP) if you can.
- **You can ONLY send ONE Message.** Due to the FCC's enforcement for TCP laws only one message can be sent out in bulk to multiple targets by an organization. Only if the recipient is prompted to provide a response to the first message can a second message be sent. Basically only one "unsolicited" message per broadcast.
- **Be engaging!** Ask a question, or ask for information on the supporter. This is a great opportunity to collect data like email address or zip code. You could also use a question as an action to prompt a second message (ie. Will you volunteer? Reply Yes or No).
- **Links can be Shortened and Tracked.** When sending a message with a link you just need to wrap using two of these brackets on either end: `{{http://myfakeurltoshowyouthisexample.com}}`
The double brackets will ultimately turn your URL when sent into a link like: <http://lil.ms/11tx>
- **Leave the default options selected.** You will VERY VERY rarely be using any of these other options. If you do, it will require another training. Some of these more advanced options include the creation of a poll or "Multiple Choice Question" or including a graphic or GIF in your message (MMS).

Character Count → 20 Left

You can ONLY add a new message if your first message asks the recipient to respond with a Keyword Trigger. →

What do you want to do? → Send a message

When message is complete click here. → Add a Message

**If there are any issues with your message you will receive a specific error message and not be able to save.*

STEP #7 - CONFIRM & TEST YOUR OPT-IN PATH!

- **CONFIRM:**
 - You should confirm that your message looks correct in this final window.
- **TEST:**
 - Text your keyword to your shortcode to make sure you get the SMS opt-in path (ie. one or a series of messages) that you just created. If you set up any IF/THEN logic (*SEE LIQUID CHEATSHEET*), make sure you get the correct response for each answer.
 - Ex. First Message includes a question like. Can you volunteer? Reply Y/N
 - Yes - Great! We'll follow-up with opportunities
 - No - No worries! There will be plenty of opportunities to help

STEP #8 - MONITORING & REPORTING

MLK Day Parade 2019 : Conversation

Type:	Phone
Shortcode:	69238
Opt-In Keywords:	milk, mk, ml, mlk
Total Opt-Ins:	105 opt-ins from 98 profiles
Currently Subscribed:	96 profiles
Currently Subscribed to This Campaign:	96 profiles

Current Conversation

milk

Joe User sent the keyword above from their phone.

Thanks for supporting Houston Federation of Teachers at the MLK Parade! Are you an educator? Reply Y/N

Reply STOP to quit, HELP for info. Msg&DataRatesMayApply

Choices:
 A. y,yes,yeah,yup
 B. n,no,nah,no way

*We will look for: **Teacher (Yes or No)***

This message will be sent via: SMS

At any given time you can click on the opt-in path you created in your “Campaign” window. Once you do it will bring up a dashboard that looks like the image on the left. Here you can see at glance:

- Your shortcode
- Your keyword options
- How many total opt-ins
- How many unique profiles
- How many unique subscribers
- How many subscribed to your campaign

From this view, we can note that:

One or more people texted the keyword up to 7 times.

Two people decided to opt-out from continuing to get messages from your organization.

We can get even more information about how our opt-in path is performing by looking at the “Report” view which can be found listed on the right side menu of the opt-in path dashboard. On the “Report” page we can see response stats by message, link click #s and percents, etc.

Sent **58 Messages** to 58 recipients Received 54 responses

Response Rate: 93.1%

Response Type	Count	Percentage															
Invalid question response	5	8.6%															
Answer	49	84.5%															
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">A. Beginner</td> <td style="width: 40%;"><div style="width: 33%; height: 10px; background-color: #0056b3;"></div></td> <td style="width: 30%; text-align: right;">16 (33%)</td> </tr> <tr> <td>B. Intermediate</td> <td><div style="width: 33%; height: 10px; background-color: #0056b3;"></div></td> <td style="text-align: right;">16 (33%)</td> </tr> <tr> <td>C. Intermediate Plus</td> <td><div style="width: 14%; height: 10px; background-color: #0056b3;"></div></td> <td style="text-align: right;">7 (14%)</td> </tr> <tr> <td>D. Expert</td> <td><div style="width: 10%; height: 10px; background-color: #0056b3;"></div></td> <td style="text-align: right;">5 (10%)</td> </tr> <tr> <td>E. No Experience</td> <td><div style="width: 10%; height: 10px; background-color: #0056b3;"></div></td> <td style="text-align: right;">5 (10%)</td> </tr> </table>	A. Beginner	<div style="width: 33%; height: 10px; background-color: #0056b3;"></div>	16 (33%)	B. Intermediate	<div style="width: 33%; height: 10px; background-color: #0056b3;"></div>	16 (33%)	C. Intermediate Plus	<div style="width: 14%; height: 10px; background-color: #0056b3;"></div>	7 (14%)	D. Expert	<div style="width: 10%; height: 10px; background-color: #0056b3;"></div>	5 (10%)	E. No Experience	<div style="width: 10%; height: 10px; background-color: #0056b3;"></div>	5 (10%)		
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2 Responses

We can also see how many people got the keyword misspelled. Ex. MLK autocorrects to milk on many phones.



Opt-In Path Statistics

Current Subscribers: [96 Subscriptions](#)

Total Messages: 401 Messages

Messages Sent: [197 Messages](#)

Messages Received: [204 Messages](#)

Conversations: [Save as CSV](#)

Keyword Statistics

Subscribers

Keyword	Activated	Ended	Subscriptions
milk	1/16/2019 4:16PM EST	Active	5
mk	1/16/2019 4:16PM EST	Active	0
ml	1/16/2019 4:16PM EST	Active	0
mlk	1/16/2019 4:16PM EST	Active	100