Compliance Checklist

cadence text

Best practices indicate that message senders should gain contact consent and maintain their preferences in order to text through platforms like Cadence. Mongoose's compliance checklist proactively protects and empowers you with the information you need to be compliant with increased carrier sensitivity to high opt-out rates and spam complaints. These changes will positively impact your Cadence experience, ensuring you maintain an engaged, attentive audience.

Follow these best practices recommended below to deliver text messages and set your school up for long-term success.

Obtain Consent

To obtain consent to send the recipient relevant text messages, the collection method should include:

- What types of messages the recipient can expect to receive
- An indication of the frequency of messages
- A place to provide a valid phone number
- A specific selection/checkbox giving consent to text messaging

Establish a Collection Process

Methods for obtaining consent should be documented and provable in the event that your institution's messaging activity leads to large spikes in opt-out rates or spam complaints. We recommend keeping a record of all opt-ins.

Places to ask for consent (opt-in) include:

- Application or document submissions
- Forms that ask for contact information
- Websites or student portals
- Event registrations
- Appointment scheduling

Need help creating your texting policy?
Please see our template here.

Store Texting Preferences

Contacts should opt into texting on a per-team basis. Each contact should have a separate preference per team or department which is aligned with how opt-in status is stored in Cadence.

Data fields associated with texting preferences should include:

- Contact name and mobile number
- Opt-in status
- Date/time that the status was last updated

Re-Establish Consent When Necessary

Obtaining consent to text an individual does not mean that consent is provided indefinitely. We recommend that your institution's texting policy includes when consent to text was last established. Storing a date/time stamp along with a contact's opt-in status is the best way to track this information. If a reasonable time (10-12 months) has passed without any messages being sent to the contact, re-establishing their consent and opt-in is recommended.
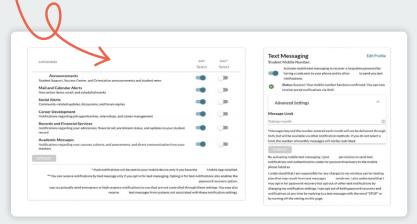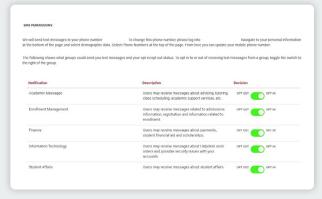
Manage Opt-Outs

There are a few possible ways that a contact may opt-out of receiving text messages which can include: texting a keyword such as "STOP," texting a statement such as "stop texting me" or indicating a desire to opt-out or remain opted out via a form, document, email, etc.
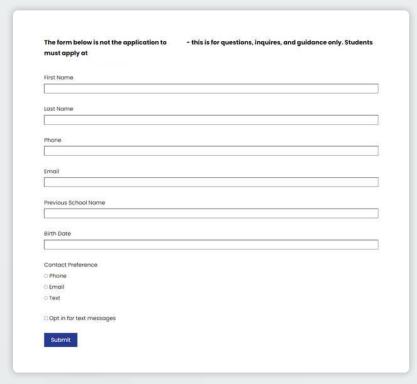
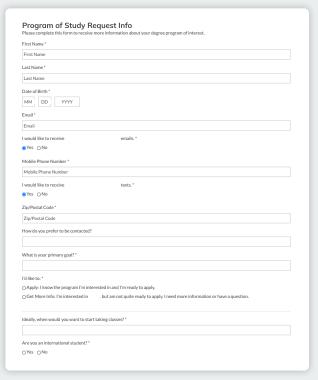## Include Opt-out Language in the First Text

Every message you send should clearly identify you (your institution's name and your department) as the sender, except in follow-up messages of an ongoing conversation. The initial message that you send to an individual should include instructions for opting out at the end of the message such as "Reply STOP to unsubscribe."

Opt-in examples from Cadence users showing how to prevent campaigns from being denied by telecommunication carriers

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Over 4,000 teams across over 950 higher education institutions partner with Mongoose to Make Every Message Count™. Our SaaS platform is an integral part of how these colleges and universities live their missions — but it's only a part.

By choosing Mongoose as their holistic engagement partner, our clients unleash the power of:

- An evolving engagement platform with digital communication solutions for every stage of the student lifecycle, from guiding students through the admissions process to transforming alumni into donors.

- A team of former higher ed professionals who live and breathe an empathy-centered approach to collaboration and customer service.

- And industry-wide insights that only a team with our long-standing, expansive footprint and technical acumen is in the position to uncover and make actionable.