



# Unlocking Texting Potential: **How to Choose the Best SMS Solution**

**In a crowded field of marketing channels that includes email, social media, digital ads, and blogs, SMS has become one of the most popular options.**

And it's not just companies that prefer SMS. There are two trillion texts sent annually, and 91% of consumers say they enjoy receiving texts from businesses.

There are plenty of reasons behind this rapid ascent from the fringe to a mainstream marketing channel. **Consider what SMS marketing offers:**

**98%**

average open rate

**90** seconds

average response time

**19%**

average click-through rate

Your own experiences probably validate these statistics. If you're like the majority of people on earth, texting is your preferred method of communication. Phone calls and emails obviously have their place, but when it comes to convenience, efficiency, and expediency, there's nothing like a text.

Of course, there's a big difference between your personal use of texts - sending quick texts to your friends and family - and a business launching a sophisticated text campaign to thousands of people. So, finding and partnering with an SMS platform is a big decision - one that can make or break the success of this communication channel.

When starting out on the SMS platform search, there are a number of things to look for.

# 14 Essential Considerations for Buying an SMS Platform

The following factors will help you evaluate your options, identify potential concerns, and move forward in the buying process with confidence. Every business is different, so be mindful of your unique priorities today and future goals. It's important to find a platform that fits your needs today and can grow with you as you scale.

## 1. Integrations

If an SMS platform doesn't operate seamlessly in your tech stack, your reps will be forced to toggle between multiple platforms during customer interactions. This clunky arrangement slows their response time, makes it harder to execute, and increases the chance for errors.

When evaluating SMS platforms, seek out an option that integrates with crucial systems like Salesforce or Hubspot. With optimized integration, your reps can easily capture and share detailed customer communication histories.

Context is everything. Regardless who engages with a customer, they will have a clear grasp of the customer's history and what led them to this moment.

Native integration is the gold standard. This means that the SMS platform doesn't merely cooperate with your CRM, but it can operate from within your CRM. Thanks to this level of direct functionality, native integration streamlines communication and empowers your reps to deliver the best possible customer experience.

## 2. Short Codes and Long Codes

Short codes are five- or six-digit phone numbers that businesses often use for sending and receiving bulk text messages. They're an efficient and reliable channel when communicating with a mass audience. They also have stricter opt-in regulations and don't typically support personal exchanges with customers.

Long code numbers, on the other hand, are traditional 10-digit numbers like the one assigned to your mobile phone or landline. While short codes enable up to 100 messages to be sent per second, long codes are usually limited to one message per second. Long codes are ideal for interacting with customers 1x1 or 1xfew. You can message back and forth as naturally as two friends exchanging messages on their mobile phones.

Your chosen SMS platform should offer both long code and short code numbers, and help you strategically use them in the best ways. Both types of numbers offer unique benefits, come with cost and compliance considerations, and deliver different customer experiences.

### 3. Security

Pay attention to the security offerings of your SMS platform. Examples of common security features include data encryption, role-based access controls, multi-factor authentication, and audit trails.

The gold standard is SOC 2 compliance, which is a framework developed by the American Institute of Certified Public Accountants (AICPA) to assess a service organization's controls and processes for customer data security, availability, processing integrity, confidentiality, and privacy. State and Federal RAMP programs offer even more security, as they are built on NIST SP 800-53.

As a best practice, ask your SMS provider about industry-leading security certifications, such as SOC 2 and RAMP, and inquire further about user access controls and audit trails.

### 4. Support

Lastly, and maybe most importantly, make sure you understand your SMS platform's support offerings. Where are they located, in the US or abroad? What does first-level support look like - is it email only, or do they offer phone support? What is the process if there is an emergency situation?

High-quality customer support will be critical to your success. You should be able to quickly reach a US-based support team by phone, text, support ticket, chat or email, so that if obstacles arise, you'll be able to find smooth resolutions.

### 5. Contact and List Management

Maintaining clean lists is not just for campaign metrics; it's for your sender reputation score, which impacts your deliverability.

Look for features like **number formatting** for consistency, **carrier lookups** to validate numbers - don't get dinged for sending text messages to landlines - for **subscription types** for better segmentation, and **dynamic lists** that update automatically. Ensure the platform supports **automated opt-in and opt-out workflows** to stay compliant and build trust. These features not only reduce risk but also help deliver more targeted, effective messages—making them critical criteria in your evaluation process.

When choosing an SMS platform, robust list management features are essential for your sender reputation score, compliance, deliverability, and campaign engagement metrics.

## 6. Understanding CPaaS and Carrier Connections

When selecting an SMS platform, it's crucial to understand how the underlying technology can affect your experience. Many SMS providers are built on third-party CPaaS solutions, such as Twilio or Sinch.

These CPaaS platforms typically maintain the relationships with carriers, which means the SMS providers are at the mercy of the CPaaS. Essentially, the CPaaS acts as the middleman between the SMS software provider and the phone carriers. This setup can introduce additional complexities, potentially complicating support issues, slowing down message delivery, and introduces another point of potential failure.

For this reason, look for platforms that offer direct carrier connections by operating as their own CPaaS. These platforms not only provide better message deliverability and reliability but also provide better support and more competitive pricing, all thanks to the elimination of the middleman.

## 7. Deliverability

Speaking of deliverability, it's essential that you understand how SMS deliverability works and how it impacts your bottom line. In its simplest form, deliverability refers to the percentage of time your SMS messages reach their intended destination. You can calculate this metric by dividing the number of delivered messages by the number of total intended recipients, and then multiplying it by 100.

When launching SMS as a channel, it is important to know that the telecom carrier's charge for messages sent, not messages delivered.

So what negatively impacts deliverability? Some culprits include invalid phone numbers, SMS gateway issues, your text message content that unknowingly flags the telecom carriers' spam filters, and end-device level errors.

A top-notch SMS platform will help you maximize the number of texts delivered, since you are paying for messages sent. They will do this through helping you build clean contact lists of valid phone numbers, keep the data accurate, help you craft text messages that won't flag the spam filters, and protect your sender reputation by not sending to landlines.

## 8. Throughput

Pay attention to your SMS platform's throughput. This metric refers to the number of messages you can send within a relevant timeframe. The most common timeframe is one second, so the metric is often referred to as TPS (throughput per second).

For example, a high TPS means that your messages will reach recipients faster and provide a more predictable experience for your marketing team. A slower TPS could lead to messages piling up in a queue instead of getting where they're supposed to go.

For mass texting campaigns, your platform's throughput is crucial because it impacts how timely and reliable your campaigns will be. For time-sensitive campaigns, high throughput is essential.

## 9. Send limits

Another consideration is an SMS platform's approach toward send limits. Some SMS providers limit the maximum number of send to as low as 10,000 messages a month.

When searching for an SMS provider, ask vendors to share their send limits. By comparing these limits to your list size and your intended messaging frequency, you can ensure that your communication efforts are not restricted by the providers' volume limits.

## 10. Consumer Opt-In/Opt-Out Compliance

Your SMS platform should serve as a trusted partner that helps you stay compliant with all the relevant regulations. While there are many regulations to remember, such as TCPA, here's a high-level primer of some of the most important rules:

- SMS subscribers need to explicitly opt into your marketing list, using either a double or single opt-in method.
- Your SMS opt-in must be standalone from your email marketing opt-in
- You must provide an example of the content recipients can expect
- You need to provide easy opt-out instructions
- All opt-out requests must be honored
- No messages sent during the federal and state quiet hours

Some providers require you to have a double opt-in. This means that you collect names through a variety of ways - from a checkbox on a form, to filling out a form, to texting a keyword to your short or long code number - then you send a text to them, and they must confirm their opt-in. A single opt-in means a simple form, checkbox, or text from the customer is enough.

Ask your SMS provider what type of opt-in they require, and training they offer for opt-in and opt-out adherence. Failure to follow the compliance rules can come with hefty consequences, and a good SMS provider will ensure that you stay compliant while streamlining your path to business success.

## 11. Link Shorteners

Given the character limitations of text messages and the fees associated, you don't want to use long URLs. The solution is to use link shorteners that abbreviate the link's length and retain its destination.

The problem with commercial link shorteners like Bit.ly and TinyURL.com is that spammers often use them to disguise malicious links so unwitting recipients will click them. For this reason, shortened links are often flagged by carriers' spam filters.

Leading SMS platforms offer their own proprietary link shortener developed with deliverability in mind. Further, a good SMS platform will let you create a branded experience for your recipients with a custom link shortener built around your brand name or tagline.

## 12. Ease of Use

Features like customized link shorteners, native CRM integration, and direct carrier connections all sound appealing. But even the most robust SMS platform becomes obsolete if your team isn't confidently able to use it.

Seek out a platform that empowers your team with an intuitive interface and usability, avoiding technical barriers that may hinder adoption, and ultimately your SMS success. The platform's reps should also provide insightful training and help your team understand best practices.

## 13. Analytics and Reporting

All reputable SMS platforms will provide prebuilt reporting, as well as the ability to create your own custom reports with their report endpoints. You and your team should be able to easily drill down into metrics, response rates, subscriber analytics, campaign analytics, and more.

It's also beneficial if the platform's Call Detail Report (CDR) logs are stored and searchable, which enhances compliance and makes it easier to research text message history.

Understanding the reporting functionality is essential to understanding where your SMS communications are succeeding and what the areas of improvement are. Ensure all reports have drill-downs, filters, sort, copy/paste, and are downloadable in PDF, Excel, and CSV functionality.

## 14. Pricing

Understanding how SMS providers price out their solutions is critical - and it's not apples to apples. Some charge for software seats, some have unlimited users. Providers often mark-up carrier pass-through fees, and hide steep upcharges in messages volumes.

Look for a solution provider that will share an example of their invoicing, and talk you through how you will be billed each month. Generally speaking, pricing that is fair, transparent, and competitive with no mark-ups is best.

## Your Organization Deserves **the Best**

As you consider the merits of various SMS platforms, your thoughtful approach will lay the groundwork for future success. Beyond competitive pricing, finding the best SMS platform for your goals and for your team involves exploring key features, integrations, security, compliance, support, and more.

Partnering with a top-tier SMS platform does more than open up a communication channel. It enhances your marketing campaigns, improves prospect and customer engagement, optimizes marketing spend, and truly makes SMS a strategic driver for business success.



# Checklist: Choosing the Right SMS Platform

Use this to guide your search for the right SMS platform and to help you find the perfect match for your unique needs.

## Integrations

- ☐ Seamlessly connect with your existing and future the tech stack
- ☐ Captures all SMS activity in the proper way for logging history
- ☐ Provides native integrations with your CRM and/or MAP
- ☐ Provides you with APIs if needed to connect to other systems

## Contact and List Management

- ☐ Provides number formatting for consistency
- ☐ Helps clean lists with carrier look ups to determine cell phone numbers and land lines
- ☐ Offers multiple subscription types
- ☐ Uses dynamic lists
- ☐ Automated opt-in and opt-outs

## Pricing

- ☐ Offers clear and transparent pricing
- ☐ Explains invoices and charges
- ☐ No Mark Ups

## Short Codes and Long Codes

- ☐ Provides both long code and short code numbers
- ☐ Helps you strategically implement long code and short code use cases

## Deliverability

- ☐ Provides exceptional deliverability performance
- ☐ Help you manage and clean your contact lists
- ☐ Offers a way to detect content that could be flagged as spam
- ☐ Provides a high throughput for your mass campaigns

## Link Shorteners

- ☐ Provides a proprietary link shortener
- ☐ Offers a branded proprietary option to further enhance your brand experience

## Compliance

- ☐ Supports single or double opt-in options
- ☐ Supports opt-out compliance in multiple ways
- ☐ Supports your campaigns without exceeding carriers' send limits
- ☐ Partners with you to protects your sender reputation

## CPaaS and Carrier Connections

- ☐ Is not built on a 3rd party CPaaS

## Ease of Use

- ☐ Is easy for your team to use, despite their technical ability
- ☐ Provides insightful training
- ☐ Offers high-quality customer support

## Analytics and Reporting

- ☐ Provides prebuilt reporting with drill downs, filters, sort, copy/paste, and download in PDF, Excel, and CSV functionality
- ☐ Enables you to create your own custom reports

## Security

- ☐ Offers industry leading security certificates like SOC 2 and RAMP
- ☐ Supports multi-factor authentication and single-sign on
- ☐ Offers user level access controls
- ☐ Offers audit trails for risk-mitigation

## Support

- ☐ Partners with you for business value
- ☐ Is based in the USA
- ☐ Is available by phone, text, email, chat, and/or support tickets
- ☐ Does not use bots or phone trees, but instead has true SMS experts answering

## About TrueDialog

TrueDialog is the enterprise SMS platform transforming how organizations connect with customers through text messaging—today's most engaging and responsive channel. Through superior features, industry-leading security, and direct carrier connections, the platform delivers enterprise-grade reliability while reducing messaging costs by up to 75%. TrueDialog is trusted by thousands of brands, including Coca-Cola, Girl Scouts, Hilton, Kansas City Chiefs, Northern Tool, SubjectWell, and Tulane University. TrueDialog combines powerful capabilities with simplified implementation. Based in Austin, Texas, TrueDialog helps organizations build stronger relationships through reliable, cost-efficient messaging. To learn more, visit [www.truedialog.com](http://www.truedialog.com).

**Take the Next Step.  
See it in Action.**

Request a Demo

