SMS Text Messaging in IQ

By using SMS in IQ, offices are able to communicate with their citizens aside from emails and calls. Our approach to text messaging has been to treat it the same as any other form of communication, with familiar interface and process. IQ offers two ways to reach citizens via SMS text messages:

1. Text **individual citizens** through IQ about the status of their casework, academy nominations, or communications to the Representative.
2. Send an **SMS text blast to a large list of citizens** as part of event promotion, constituent services, legislation on the floor, etc.

Configure account with Twilio

You'll first need to configure a shared account with our partners at Twilio. After doing so - email your IQ Consultant to facilitate the one-time account linking. Once the integration is completed, your office has the option to:

1. Set-up a 10 digit phone number and allow citizens to text their elected official.

2. Initiate SMS to the primary citizen in the service record from within the service itself.

3. Retroactively associate SMS message(s) with a citizen to a service record using the ID#.

Easily view any pending text messages by adding the SMS tile to your homepage using the widget icon in the top left corner
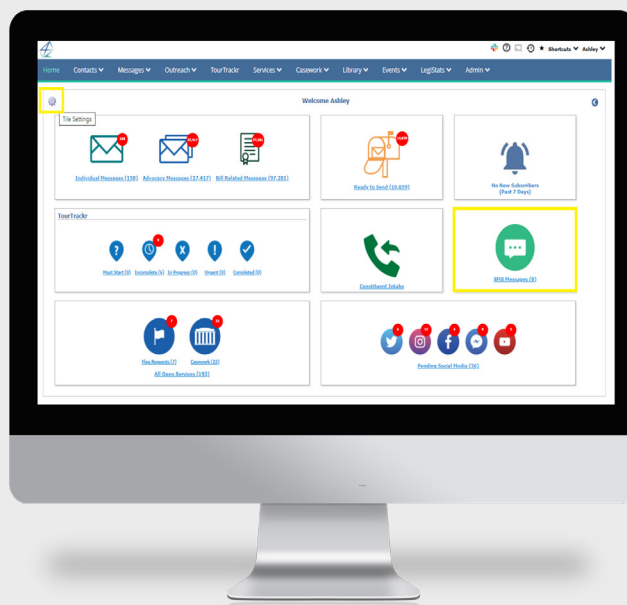
SMS Text Capabilities

Clicking the SMS Messages tile will give you access to the following in-row actions:

• Remove texts from the queue (no reply).
• Reply using a full Message record (allows you to tag with an issue code, reassing another staffer, request approval, color code etc.).
• Re-assign the message to another staffer
• Use Quick Reply as an immediate response. This creates an IQ Message record and closes the record.

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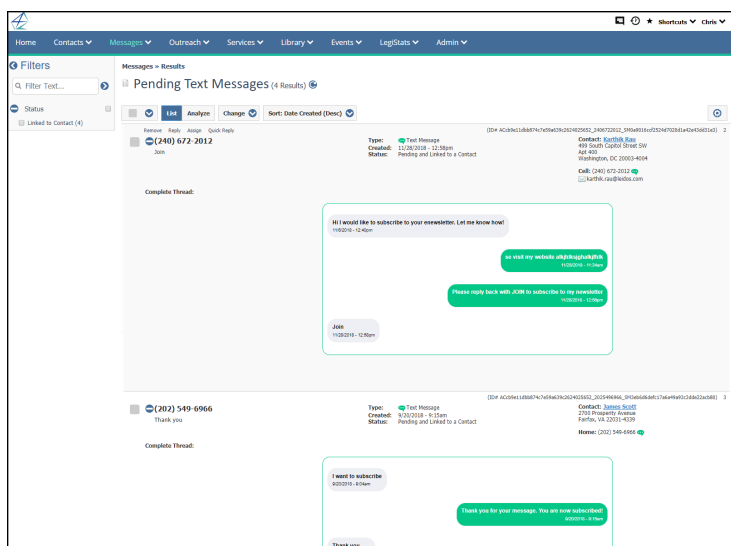
Individual SMS Text Messaging in IQ

Quick Reply Feature

Users have the option to respond immediately to incoming text messages with our easily recognizeable interface. Your response creates a new IQ Message record in the background and closes the record in pending messages.
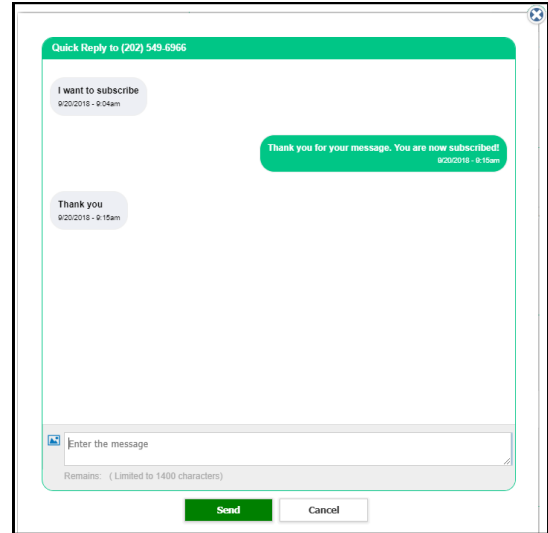
Initiate SMS within a Service Record Page

If you wish to send an SMS message to a citizen from within a casework service record, simply select the **mail** icon next to the primary contact's name and change the outgoing method to SMS. Once the message is sent, the text will be attached to the casework service record.
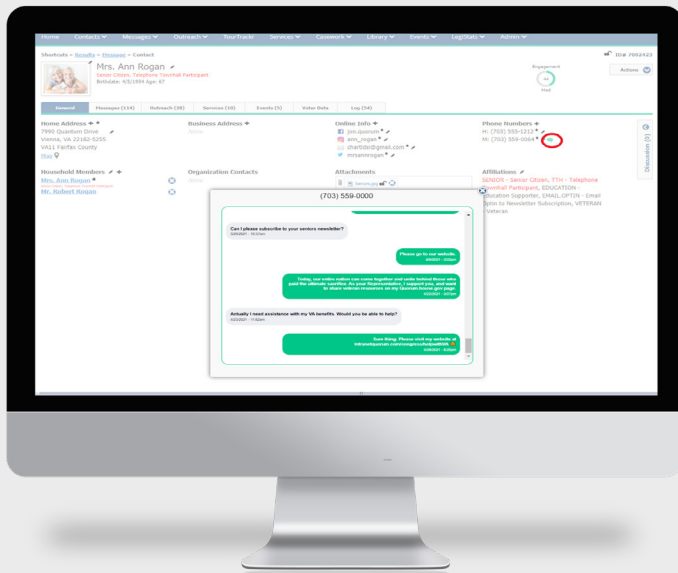
Users also have the ability to retroactively attach SMS messages to a service record or attach Message records from the pending SMS queue:

- In the open service record, click on **+Message** in-row action.

- From the message, copy the ID# found in the top right corner and paste into the **+Message** box.

- Once attached, users will see the most recent text appear in the expanded zone of that case and within the detail tab of the casework tab.

- The text message thread will also appear in a constituent's contact record denoted with a green SMS bubble.

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Text Blast Campaign/ Mass SMS Communication

We recommend using this method for any audience larger than 10K. For the larger audience text blasts we work with our partners at Broadnet, the same partner we use for our Telephone Town Hall events.

Mass SMS Communication

For this method, notify your Leidos Account Manager to execute a one-time account set-up – this account usually takes ~24 hours to create. To create the account, our team will need to know the following details for **Part I Account Configuration** and **Part II Broadcast Information**.

Part I: Account Configuration

We will secure a toll-free number from which the messages will originate. This toll-free number will display on participant phones with the message. When called, this number needs to connect to one of the following options:

- **Transfer number to office** (office provides number)
- **Use a generic sound file**
  Script: *"Hello. You have recently received a text message from this number. To opt out of future texts, please reply "Stop" to the originial message. Thank you."*
- **Use a custom recording -** We can use the Custom Caller ID sounds file, however it does state, "I was calling to invite you..." Which may be confusing as these participants will be receiving a text not a call.

Once you have confirmed of the above options, we will set up your account. **Please keep in mind that it can take up to one full business day to set-up the account after the above has been confirmed.**

Part II: Broadcast Information

In addition to setting up the account, we will also need the below information in order to set up the broadcast:

- **Date and Time of Broadcast:** Please note that we can broadcast about 50K texts/hour and curfew restrictions will apply to all messages.
- **Messages to be sent:** In order to remain compliant, this message must contain an opt-out option – we recommend 'STOP2Stop'.
- **Test phone number:** We will send a sample text message to this number prior to broadcasting to the full list. This message must be reviewed and approved before we set up the full broadcast.
- **List of mobile numbers:** Connect with your IQ Consultant to determine the list size and criteria of the mobile numbers you'd like to reach. We will pull that list for you and ensure it's uploaded into the system.

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Pricing Information

Pricing is determined by the length of the text (INCLUDING spaces):

# of Characters	Price per text
0-160	$0.03
161-320	$0.06
321-480	$0.09

*The one-time set-up fee for new mass text clients is $150. In order to allow for predictable pricing, we include a 10% auto-reply response rate factored into any pricing quotes delivered to clients. Offices usually send a text blast between 160-320 characters.

If you'd like to include an **auto-reply**, our team would need the language. An auto-reply message is not required and completely up to the office.

Sample auto-reply text

"Hi, this is Rep. XXX leting you know that I'm working hard to help keeping my constituents informed on the coronavirus and the recent stimulus bill. Please visit http://XXX.house.gov/ to learn more."

Auto reply: "Thank you for your message. If you have any questions or need help, please contact my office at (XXX) XXX-XXXX."