

A SELF-AUDIT

Twelve questions your SMS reporting should be able to answer

For teams running SMS out of Salesforce. It takes an afternoon, and nobody sees your answers but you.

How to run it

Open whatever reporting you have today. For each question, decide whether you could answer it from a report you can pull yourself, right now, without asking a vendor and without asking someone to write a query first. Mark it yes or no.

The questions run from what most platforms handle well to what most handle poorly. A low score in the last section is not a sign that your setup is misconfigured. It usually means your measurement ends earlier than your risk does.

PART ONE

Did the message leave?

- | | | | |
|----|---|----------------------------|----------------------------|
| 01 | How many SMS did you send last month, broken out by campaign? | Y ☐ | N ☐ |
| 02 | How many subscribers were opted in on the first of the month, and how many on the last? | Y ☐ | N ☐ |
| 03 | What is your opt-out rate for each campaign, and which campaign is your highest? | Y ☐ | N ☐ |
| 04 | For one named subscriber, can you see the status of every message you have sent them? | Y ☐ | N ☐ |

If you run MobileConnect, all four are covered by the standard SMS reports. Answering yes here is the expected result, not a distinction.

PART TWO

Did it arrive?

- 05 How many of last month's messages came back undelivered? Y ☐ N ☐
-
- 06 Can you pull that number from a report, or does someone write a query first? Y ☐ N ☐
-
- 07 When a message fails, do you get a reason code back? Y ☐ N ☐
-
- 08 How soon do you learn about it, the same day or whenever someone next goes looking? Y ☐ N ☐

In Marketing Cloud, undelivered-message reasons are retrievable through SQL and the API. That is a lookup you run after the send has gone out. It answers what happened last week rather than what is happening now.

PART THREE

Did the carrier let it through?

- 09 What share of last month's sends were filtered by a carrier rather than rejected outright? Y ☐ N ☐
-
- 10 What is your spam-likely rate on each number you send from? Y ☐ N ☐
-
- 11 Which carrier delivers your traffic best, and which one delivers it worst? Y ☐ N ☐
-
- 12 If delivery to one carrier fell by a third tomorrow, what would tell you, and how long would that take? Y ☐ N ☐

Salesforce documents carrier filtering in detail. Its own MobileConnect training covers what carriers block and which phrasing trips spam filters. The three standard SMS reports, SMS Account Summary, SMS Message Detail and SMS Message Summary, report opted-in counts, message volume, per-subscriber send status and per-keyword activity. They do not report carrier-level deliverability, spam-likely rates or carrier filtering. The behavior is documented and the instrument for measuring it sits outside the standard reporting.

Source: Salesforce Trailhead, SMS Messaging with MobileConnect, trailhead.salesforce.com/content/learn/modules/sms-messaging-with-mobileconnect

SCORING

What your answers mean

Mostly yes through part two, mostly no in part three.

This is the ordinary shape of a well-run program. You can see what you sent and what came back. Delivery gets inferred from whether people reply, and that inference holds for as long as reply volume stays steady.

Yes to 9 through 12.

Something outside your standard reporting is feeding you carrier data. Find out what it is and who maintains it. Then check whether it covers every number you send from, or only the ones somebody set up carefully.

No to question 12.

Sit with this one whatever the rest of your score looks like. Question 12 asks what your early warning is, and the honest answer for most teams turns out to be the reply rate itself, which is the thing the warning was supposed to protect.

Why question 12 is the one that matters

Say your reply rate drops by a fifth next month. There are two explanations, and they point in opposite directions.

EXPLANATION ONE

Fewer people wanted to answer. That is a message problem, and rewriting the copy or changing the offer is the right response.

EXPLANATION TWO

Fewer people received the message. Here rewriting makes things worse, because every additional send into a number carriers have started filtering deepens the filtering you are already subject to.

On a report that counts sends and replies, the two are indistinguishable. Replies went down. Most teams assume the message, since that is the explanation they know how to act on, and a delivery problem can run quietly for a quarter while everyone works on copy.

Carrier data is what separates the two, and it is the layer the standard reports leave out.

If part three is where your no answers are

That layer is the work Aktify does. We run the conversation layer on top of the record you already keep: carrier relationships, 10DLC registration, opt-out handling and brand reputation, which are the parts that get a program throttled or shut off. Every conversation stays yours, in full, exportable, visible from the first day.

We run the program. We do not hold your data.

If you want to compare your answers against what the layer actually reports, book twenty minutes and bring your numbers from part three, including the ones you could not fill in. Those are the useful ones.

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