

**Nov 21, 2024**

## **SMS Policy and Procedures**

### **1. Purpose**

The purpose of this policy is to establish guidelines for the proper use of SMS (Short Message Service) communication with clients. It outlines procedures for obtaining consent, ensuring compliance with privacy regulations, adhering to carrier SMS policies, and maintaining the integrity of Call to Action (CTA) messaging.

### **2. Scope**

This policy applies to all employees, contractors, or third-party vendors who use SMS communication to engage with clients. This includes all SMS marketing, customer support, transaction-based messages, and any other messaging sent to clients via SMS.

### **3. Obtaining Consent for SMS Communication**

#### **3.1. Clear Consent Requirements**

Before sending SMS messages to any client, explicit consent must be obtained. This consent can be obtained through one of the following methods:

- **Opt-in via Text:** Clients may text "START" to a specific short code or phone number. A confirmation message will be sent to the client to acknowledge their opt-in.
- **Opt-in via phones:** Clients may request opt-in by calling our store at 604-305-0345 and explicitly request communication via sms.

#### **3.2. Record Keeping of Consent**

Our system will maintain a log of all consent records, including the date, method, and confirmation of consent. This log will be retained for at least 5 years in accordance with applicable data retention policies.

#### **3.3. Revocation of Consent**

Clients have the right to opt-out of SMS communication at any time. To opt-out, clients may:

- Reply with "STOP,".
- Call us at 604-305-0345 and request opting out.

Once consent is revoked, the client's phone number will be removed from all future SMS campaigns or communications.

#### **3.4. Special Considerations for Sensitive Content**

If sending sensitive or high-risk content (e.g., marketing for financial services, healthcare updates, etc.), explicit, double opt-

in consent is required. A confirmation message must be sent to the client to confirm their subscription.

#### **4. Compliance with Privacy Policies**

##### **4.1. Data Privacy and Security**

We are committed to protecting the privacy and security of client data. SMS communications will only be sent to individuals who have consented, and personal information will be handled in accordance with our company's privacy policy and applicable data protection regulations, such as the GDPR, CCPA, and other relevant privacy laws.

- Personal information collected for SMS purposes will only be used to send relevant, consented communications.
- Clients' phone numbers will not be shared with third parties for marketing purposes without explicit consent.
- SMS content will be stored securely, and data will be encrypted when necessary.

##### **4.2. Privacy Notices**

Clients will be provided with a privacy notice that explains the nature of SMS communications, the data we collect, and how their information will be used. This notice will be provided:

- At the point of opt-in, clearly informing the client that they are agreeing to receive SMS messages and explaining their rights, including how to revoke consent.

#### **5. Carrier SMS Policies Compliance**

##### **5.1. Adherence to Carrier Guidelines**

All SMS communications must comply with the terms and conditions set by mobile carriers and messaging service providers. This includes:

- **No Spamming:** SMS messages should never be sent in a manner that constitutes spam. We will only send messages to individuals who have explicitly opted in.
- **Content Restrictions:** SMS content must not include prohibited or illegal material, such as misleading or fraudulent information.
- **Message Volume Limits:** We will not exceed carrier limits on message volumes, ensuring messages are sent in a compliant and non-intrusive manner.

##### **5.2. Compliance with Short Code and Long Code Regulations**

- **Short Code:** We will use dedicated short codes that comply with carrier requirements for marketing and transactional messages.
- **Long Code:** When using long codes for messaging (e.g., individual phone numbers), we will follow specific carrier rules for customer communication, ensuring these numbers are not used for promotional purposes without consent.

##### **5.3. Message Frequency**

Clients will be informed at the time of opt-in about the frequency of messages they may expect. For example, messages could include promotional content, service updates, or alerts, but will be limited to 1 message per month).

#### **6. Call to Action (CTA) Guidelines**

##### **6.1. Clear and Accurate CTAs**

Every SMS communication must include a clear, accurate, and compliant Call to Action (CTA). Each message must contain

the following:

- **Opt-out Instructions:** Clients must be informed of how to unsubscribe from future SMS messages (e.g., "Text STOP to unsubscribe").
- **Next Steps:** The CTA must be clear regarding what the client is expected to do next (e.g., "Reply YES to confirm your booking").
- **Message Purpose:** If the message is promotional, the CTA should clearly explain the value proposition (e.g., "Claim your 20% discount now!").

## 6.2. Regulatory Compliance

CTAs must comply with industry standards and regulations, such as the Telephone Consumer Protection Act (TCPA) and the CAN-SPAM Act. This includes:

- Ensuring that all marketing messages are clearly identified as such.
- Including the company name in the message, where appropriate.
- Avoiding deceptive, misleading, or exaggerated claims in the CTA.

## 7. Using SMS for Communication

### 7.1. Types of SMS Communications

SMS will be used for the following purposes:

- **Transactional Messages:** Includes order confirmations, shipping updates, appointment reminders, etc.
- **Customer Support Messages:** Includes responses to client inquiries or requests.
- **Account Updates:** Includes important alerts, such as security notifications or policy changes.

### 7.2. Message Content Guidelines

All SMS content must be:

- **Concise:** SMS messages should be clear and to the point, limited to 160 characters if possible.
- **Accurate:** Information shared must be accurate, truthful, and up to date.
- **Respectful:** Communications should not be intrusive, excessive, or disrespectful to clients.

### 7.3. Emergency or Critical Alerts

For emergency or critical messages (e.g., account security alerts, system downtimes), clients will be notified promptly and clearly, with specific instructions for action. These messages will not require prior opt-in consent but will be subject to relevant privacy regulations.

## 8. Training and Monitoring

### 8.1. Employee Training

Employees who manage or engage in SMS communication will undergo regular training to ensure they understand and adhere to these policies, as well as any legal or regulatory changes related to SMS marketing and communication.

### 8.2. Monitoring and Auditing

We will regularly audit our SMS campaigns to ensure compliance with this policy, as well as monitor for any issues such as high opt-out rates or complaints. Non-compliance will result in corrective action and potential disciplinary measures.

### **9. Enforcement**

Failure to comply with this policy may result in disciplinary action, up to and including termination of employment or contract.

### **10. Review and Updates**

This policy will be reviewed at least annually, or more frequently if required by changes in regulations or carrier policies. Updates to the policy will be communicated to all relevant stakeholders.

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### **Acknowledgment**

By following these guidelines, we can ensure that our SMS communications are compliant with industry regulations, carrier policies, and privacy laws, providing value to our clients while maintaining their trust.