

Digital Messaging Platforms Selection Guide



Criteria and questions to help your organization research, compare and evaluate digital messaging platforms



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Criteria 1-3

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CRM-NATIVE INTEGRATION

Integrate digital messaging tools with your Client Relationship Management (CRM) system to increase oversight of conversations with clients and simplify work for staff.

- Does the tool integrate with your existing CRM?
- Can incoming and outgoing messages be linked to client records?
- Can staff view and continue conversations within the CRM?
- Can multiple staff members access a client's conversation when needed?
- If there is no direct integration, how will messaging activity be recorded and tracked?

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MULTIPLE CHANNELS

Support multiple messaging channels to meet client preferences today and adapt as they evolve, with room to expand over time.

- Which messaging channels do your clients currently use or prefer?
Examples: Facebook Messenger • Instagram • Signal • SMS • WhatsApp
- Which channels do you need now, and which might be needed in the future?
- Do your existing systems support any of these channels?
- Can the digital messaging tool support a phased approach, allowing you to introduce additional channels over time?

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STAFF TRAINING & ONBOARDING SUPPORT

Build the capacity to set up, administer and support the tool effectively.

- What internal capacity do you have to set up, administer and support the implementation?
- What training will your IT team and staff need?
- Does the vendor provide onboarding and implementation support?
- What ongoing technical support is available if issues or escalations arise?

Criteria 4-6

4



USER-FRIENDLY SETUP

A tool that is easy to configure and maintain can reduce reliance on developers or external support and make it easier for an organization to manage the solution over time.

- Can changes and configurations be made without coding?
- Can you manage routine changes and troubleshooting internally?
- How much customization or development is required?

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BUILT-IN ANALYTICS

Analytics can help organizations understand how the tool is being used and whether it is achieving its intended purpose.

What type of data do you want to measure? For example:

- Adoption: Number of programs and staff using digital messaging tools
- Usage: Messages sent and received; manual vs. automated
- Engagement: Client response rate; link clicks or request completions
- Efficiency: Staff time saved; reduction in follow-ups or missed appointments

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TWO-WAY COMMUNICATION

Two-way communication allows clients to respond to messages and staff to continue the conversation through the same channel. This supports engagement and meaningful communication.

Which of the following features are important to you?

- Can clients reply directly to messages?
- Can staff send and receive messages in the same tool?
- Can staff view the full conversation history?
- Can another staff member take over a conversation?
- Does the tool support the conversations we expect to have?

Criteria 7–8

7



SUSTAINABLE, AFFORDABLE SOLUTION

The cost of a solution goes beyond the initial purchase or subscription. Organizations should consider ongoing costs and how those costs may change as usage grows.

Here are some potential costs to factor in:

- Initial setup and implementation costs
- Ongoing subscription or licensing costs (which may be usage/tier based)
- Additional costs for phone numbers, users, channels or features

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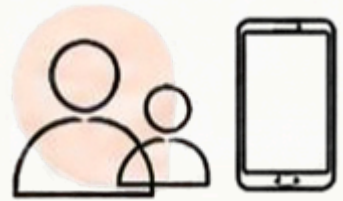


TRANSPARENT DATA & PRIVACY POLICIES

Organizations need to understand how client and organizational data is collected, stored, processed and protected. Clear information about data storage, processing, retention and AI features helps assess privacy and security practices against organizational requirements.

- Where is your data stored and processed?
- Can the vendor produce clear privacy, security and data-processing documentation?
- Does this tool meet your organization's privacy, security and data-governance requirements?

Applying the Criteria to Your Organization



YOUR CLIENTS

What channels do clients use?

Consider the messaging channels your clients currently use or prefer



YOUR DATA

What are your requirements?

Consider organizational and funder requirements around privacy, security, data residency and processing



YOUR RESOURCES

What capacity do you have and what can you sustain?

Consider implementation and ongoing costs associated with this technology



YOUR STAFF

What support will your staff need to adopt the new technology?

Consider the staff time, training and support needed to adopt the new technology



YOUR TECHNOLOGY

What systems do you already use?

Consider your existing Client Relationship Management system and how the messaging tool can integrate with that system