

Call-To-Action (CTA) Guidelines

A practical reference for compliant messaging-program opt-in experiences

Document focus

Opt-in methods • Required CTA elements • CTA examples • Messaging Terms & Conditions

Introduction

A clear call-to-action (CTA) helps consumers understand what they are signing up for and how to manage their messaging preferences. This mms guide provides a practical guide to designing transparent opt-in experiences for messaging programs serving consumers in the United States and Canada.

The following sections outline opt-in methods, key disclosures, and sample language for web forms, keyword enrollment, verbal and IVR scripts, and messaging Terms & Conditions. Use these examples as starting points, adapting program names, message descriptions, frequency, support details, and policy links to reflect your actual service.

This document is intended as operational guidance, not legal advice or a guarantee of compliance. Before launching a program, confirm that your enrollment experience and disclosures meet the requirements applicable to your messaging use case, destination, and service providers.

Opt-In Principles

Consumers must opt-in to receive messages associated with a specific messaging program. Enrolling a consumer in multiple programs based on a single opt-in is prohibited.

If a program has multiple use cases, it should be clearly identified at the CTA. Opt-in details must be clear and cannot be displayed obscurely in terms and conditions related to other services.

Ways to collect opt-in

- Web opt-in
 - If opt-in is collected as part of a form (application etc.), there must be a separate optional checkbox (unchecked by default) or a section for SMS opt-in.
- Keyword opt-in (user texts in advertised opt-in keyword like “JOIN”)
- Verbal opt-in (e.g. while speaking to a representative on the phone)
- IVR opt-in
- Other point-of-sale (POS) methods (e.g. paper form)

Elements required for a valid CTA

- Program description
- Message frequency disclosure (e.g. Message Frequency Varies or Single message program)
- “Message and data rates may apply” disclosure
- Link to Terms and Conditions
- Link to Privacy Policy
- STOP keyword (e.g. Reply STOP to cancel)
- HELP instructions (e.g. Reply HELP for help)



CTA Examples

Web opt-in Template

Sign up for [Program name]

Mobile number: _____

[] I agree to receive recurring automated [program description] at the phone number provided. Message and data rates may apply. Message frequency varies. Reply HELP for help and STOP to cancel. View our [Terms & Conditions](#) and [Privacy Policy](#).

Example



Sign up for SMS Account Alerts

Mobile Number: _____

[] I agree to receive recurring automated informational Account Alerts including payment reminders and service updates at the phone number provided. Message and data rates may apply. Message frequency varies. Reply HELP for help and STOP to cancel. View our [Terms & Conditions](#) and [Privacy Policy](#).



Keyword opt-in Template

SIGN UP FOR [Program Name]

Text JOIN to [number] to begin receiving texts

By signing up via text, you agree to receive recurring automated [program description] at the cell number used when signing up.

Message frequency varies. Message & Data Rates May Apply. Reply HELP for help; STOP to cancel. View our [Terms & Conditions](#) and [Privacy Policy](#).

Example



Sign up for SMS Account Alerts

Text JOIN to 12345 to begin receiving texts

By signing up via text, I agree to receive recurring automated informational Account Alerts including payment reminders and service updates at the phone number provided. Message and data rates may apply. Message frequency varies. Reply HELP for help and STOP to cancel. View our [Terms & Conditions](#) and [Privacy Policy](#).

Verbal / IVR Opt-In

SCRIPT

Agent or IVR: As part of our service, we can send you automated informational text alerts regarding your account activity and service updates. Message frequency varies. Message and data rates may apply. At any time you can text HELP for help and STOP to opt out. You can view program Terms & Privacy on our website at <https://...> Would you like to opt in to receive SMS Account Alerts?

Customer: Yes please

Agent or IVR: Great you'll receive a text message to confirm your enrollment.

Terms & Conditions

Terms & Conditions and Privacy Policy are required elements for all messaging programs. Terms & Conditions can be displayed in full directly below the CTA or accessed from a link within the CTA. Program terms can be incorporated into a separate section of the brand's existing Terms & Conditions page or be a standalone page.

Required elements

- Program or brand name
- Message frequency disclosure
- Program description
- Customer care contact information ("Reply HELP for help" and email address, phone number or support link)
- Opt-out information ("Reply STOP to opt out")
- "Message and data rates may apply" disclosure
- Privacy Statement and/or link to full Privacy Policy
- Privacy policy should state that personal information collected for SMS opt-in is not shared or sold. (e.g. "*No mobile information will be shared with third parties/affiliates for marketing/promotional purposes.*")
- Disclosure stating that "Carriers are not liable for any delayed or undelivered messages"



Sample Template for Mobile Terms & Conditions

MESSAGING TERMS & CONDITIONS

By opting into our texting program, you agree to receive recurring automated [program description] messages from [brand name]. Texts may be sent using an automatic telephone dialing system. Message frequency varies. Message and data rates may apply.

You can cancel any time by texting STOP. For help reply HELP or contact [customer service email] or call [customer service toll free phone]

Consent to receive text messages is not required as a condition of purchasing any goods or services.

Mobile carriers are not liable for any delayed or undelivered messages.

Privacy Policy and Data Protection

The information and data ("personal data") which is provided by you when you use the service will be held and used by Service Provider and its suppliers and contractors in order to provide the service to you. Your personal data may only be passed to your cellular phone provider or to relevant regulatory bodies, the police or other authorities in the course of the investigation of any complaints or suspected unlawful.

No mobile information will be shared with third parties/affiliates for marketing/promotional purposes.

Privacy policy: <https://...> (link to full privacy policy)