

Outbound and campaigns checklist

Principles for assistants that start conversations. Not legal advice.

Designer

Product

Developer

BEFORE SENDING

- Recorded, current consent for this channel and purpose
- Not on any suppression or opt-out list
- Allowed hours in the recipient's time zone
- Frequency cap not reached
- Approved template and claims
- Identify who you are and why; disclose automation

MESSAGE DESIGN

- One reason, one value, one clear action
- Easy opt-out in every message
- Handle STOP and HELP deterministically
- Pass campaign context to the assistant for replies
- Verify identity before sharing personal details

MAILINGS WITH AI

- Fill approved templates, never invent offers or claims
- Content guardrails and required legal text
- Human approval and sample review across segments
- Log prompt version, data and final text

MEASURE

- Delivery and bounce
- Reply rate and sentiment
- Opt-out and complaint rate, with automatic stop thresholds
- Outcomes and resolution of resulting conversations
- Cost per successful outcome

CHECK BY MARKET

- Telephone and messaging rules (for example the US TCPA)
- Email rules and authentication (SPF, DKIM, DMARC)
- Data-protection laws (for example GDPR, LGPD)
- Platform policies for templates and registration