

Statement of Needs: Mobile Communications/SMS Engine

Mobile Phone penetration in the UK is estimated at 100%, i.e. almost all the addressable population have at least one mobile telephone with an increasing number of the population not having a traditional fixed-line telephone. Use of Short Message Service (SMS) to send and receive text messages and accessing the Internet via the mobile phone are increasing trends.

points4life will make use of mobile communications, particularly SMS, to encourage adoption and on-going active participation in the programme. Participants will be able to determine their points balance, add to their points or redeem points in a variety of methods and outlets and mobile communications will be one of the enabling technologies that will facilitate these activities.

The ability to broadcast messages to a large number of people and forward them to users when their phone is switched on in a specific locality will be a potential requirement. Similarly, retaining the message on the Subscriber Identity Module (SIM) card allows users to maintain and view their points4life balance and similar messages, encouraging greater participation.

It is expected that mobile communications and SMS will be used throughout the points4life programme.

Mobile Phone Use

Requirement	Current Thoughts on Satisfaction of the Requirement
Handset Availability	Mobile Communications/SMS services must be available on as many different types of mobile phone handset as possible.
Application	The Mobile Communications/SMS services must work without the need to modify any mobile phones. The use of an applet or similar modification will be considered however this is not the preferred solution due to consumer reluctance to download and install on phones.
Functionality	Research by the University of Plymouth suggests that mobile phone users are typically either "texters" or "talkers". Determining as part of the delivery of the Mobile Communications/SMS services how both types are catered for without undue preference or loss of functionality is important, in addition to allowing users to select the most appropriate method to suit their needs at a particular time.
Handset Changes	Given that many users change their handset frequently and a substantial number lose their handset there is a need to identify how users may transfer their points4life account, functionality and other attributes to their replacement handset and also a requirement to identify how to prevent fraudulent use if a handset or SIM card is found or stolen.
Advanced Functionality	Customers with enhanced handsets with advanced functionality, for example video capability, should be separately identifiable. These consumers may select options within the points4life programme taking advantage of these attributes, such as receiving short video messages.

points4life Enrolment and Mobile Communications

Requirement	Current Thoughts on Satisfaction of the Requirement
Immediate Activation	<p>Mobile communications could be an important factor in activating new participants in the points4life programme. At its simplest this could be partial enrolment via a simple SMS test message, or phone call to the Contact Centre, quoting the number printed on the 'take one' leaflet, through to full enrolment and completion of a full health and well-being survey, possibly via a URL link.</p> <p>Immediate activation of cardholders must be provided using mobile communications technology.</p>
Full Activation	<p>If cardholders have opted for partial activation, for example via a text message, there is a requirement that a trigger SMS message is sent or some other process is triggered to ensure comprehensive details are obtained and the user is fully enrolled.</p>
Uncompleted Enrolment	<p>There is a requirement to maintain records of all partial activations and after a specific time interval (to be agreed) or number of communication attempts (to be agreed) the enrolment/participation should be suspended and any points or other benefits that the cardholder may have earned erased.</p>
Partial Activation	<p>Consumers should be offered the opportunity of partially activating their membership of the points4life programme using their mobile phone handset with full activation using other methods, including postal or web-site application, while ensuring links between these records are retained.</p>
Additional information	<p>One of the methods used to recruit cardholders will be through cardholders texting a short code and then a welcome pack being sent out. Cardholder details from the SMS text message must be passed to those areas involved in delivering the welcome packs.</p>
Other Methods	<p>Even if the user chooses to enrol in the points4life programme by alternative method, best endeavours must be made to obtain details of the user's mobile phone number, International Mobile Equipment Identifier (IMEI), handset-type and any other information required to facilitate mobile communications within the points4life programme.</p>

Mobile Communications and Points Validation

Requirement	Current Thoughts on Satisfaction of the Requirement
Membership Validation	Those delivering other services may request the cardholder to validate their points4life membership using their mobile phone handset, e.g. by SMS text message.

Mobile Communications and points4life Promotion

Requirement	Current Thoughts on Satisfaction of the Requirement
Individual SMS Text Messaging	At its simplest, mobile communications could be used to send a text message to cardholders in the points4life programme to advise of specific offers or available bonuses related to their usage or purchasing patterns or linked to specific unstructured physical activities, e.g. regular runners may receive “double points” on purchase of a pair of running shoes.
Local Broadcasting	Ideally, although at a later stage, there is a requirement to assist in the promotion of points4life schemes of a temporary duration in a specific location, e.g. for a specific retailer, shopping centre or market. The requirement would be to only target programme members in the vicinity, within a particular time period and to ensure that superfluous messages are not broadcast.
Enhanced Broadcasts	Handset functionality is continually improving with increasing numbers having the ability to send and receive video messages. There is a requirement, to direct relevant short and inexpensive video messages/advertisements to points4life cardholders with applicable handsets.

Mobile Communications, Points Balance and Points Redemption

Requirement	Current Thoughts on Satisfaction of the Requirement
Points Balance	There is a requirement to provide regular points balance information to points4life cardholders, using mobile communications technology, e.g. by text message. There is a further requirement to identify the optimum frequency to balance maximising availability at minimal cost.
Points Verification	Often a user may wish to ascertain their current points balance – this must be achieved in the most cost-effective fashion, using an SMS text message or brief “semi-automated” mobile phone call to receive their balance details in as short a time as possible. If the points balance is insufficient for the reward the participant may use similar functionality to request a quotation using part points and part cash payment to achieve a specified reward.

Validation	There is a requirement for a Provider or points redemption partner to request the user to validate their points4life membership using their mobile phone handset, e.g. by SMS text message.
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Mobile Communications and De-activation

Requirement	Current Thoughts on Satisfaction of the Requirement
User De-activation Procedure	<p>A cardholder may by sending a simple SMS text message withdraw from the points4life programme. A validation procedure must be put in place to ensure cardholders are not de-activated incorrectly.</p> <p>Upon de-activation the cardholder should be provided with confirmation and details of how to deal with any outstanding points balance or any other matters arising.</p>
Mobile inactivity	There is a requirement to recognise where a user that was once a regular user of the mobile format to communicate with points4life has stopped and a requirement to identify if the mobile is still active. If not active a process needs to exist to pass this information back to other service providers so an alternative means of communication can be attempted to see if a new mobile number is now being used and for that number to be captured.
“Idle” Users	<p>The Provider must be able to send a message to inactive (“idle”) users, after a specific period of inactivity (to be decided, but likely to be three months) to encourage them to renew their participation in the points4life programme.</p> <p>This requirement includes assessing how to identify along with the other service providers those cardholders that may be infrequent users, e.g. those people only occasionally travelling into Manchester, and others that may have been regular participants in the programme and have lapsed for whatever reason.</p>
Inactive Users	points4life may decide to terminate membership of any points4life cardholder after a specific period of inactivity (to be decided, but likely to be a maximum of six months) and may request the Mobile Communications/SMS Engine to communicate with the user, e.g. by mobile phone call or SMS text message, at least once, prior to termination.
De-activation by points4life	Upon de-activation, the Provider would need to do whatever is necessary to communicate with the cardholder to effect de-activation in a controlled manner.