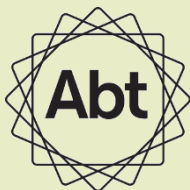# SMS for Social Franchises

Pamela Riley

Strengthening Health Outcomes through the Private Sector (SHOPS) Project

Social Franchising Conference, Mombasa, Kenya
November 11, 2011
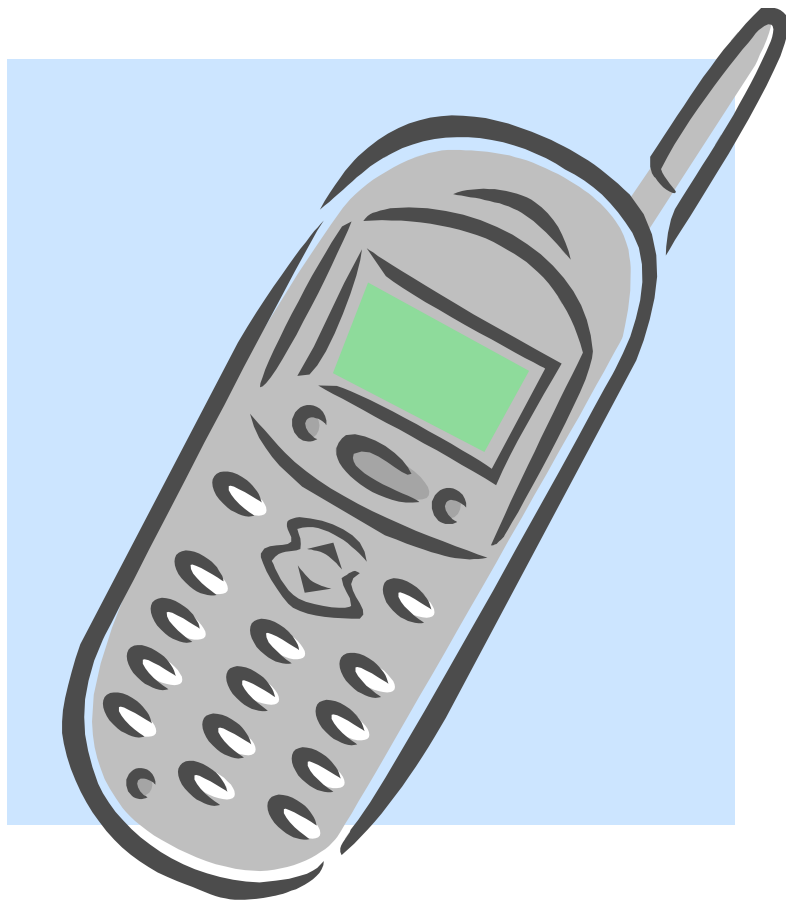
WORKSHOP AGENDA

- Part 1 OVERVIEW
- Part 2: mHEALTH LANDSCAPE
- Part 3: WHY FOCUS ON SMS
- Part 4: FRONTLINESMS:Learn INTRODUCTION
- Part 5. TRAINING MODULE
  - Activity #1: SMS Needs Assessment
  - Activity #2: Content Development
- Part 6: WRAP-UP: LESSONS LEARNED

SMS Workshop Participants

- About you - how many
  - Are or have deployed SMS
    - Data collection?
    - Client communication?
    - Other?
  - Thinking about it
  - Not sure, skeptical about value

I. OVERVIEW
Workshop Objectives

- 1**. Inspire and motivate**
  - What is mhealth's potential for social franchises
- 2. **Provide the right questions to ask**
  - Do you need an SMS program? Why?
- 3. **Introduce a new SMS training tool**
  - How it works and what we have learned so far
- 4. **Offer a step-by step guide**
  - A "how to" for implementation
- **5. Share missteps and lessons**
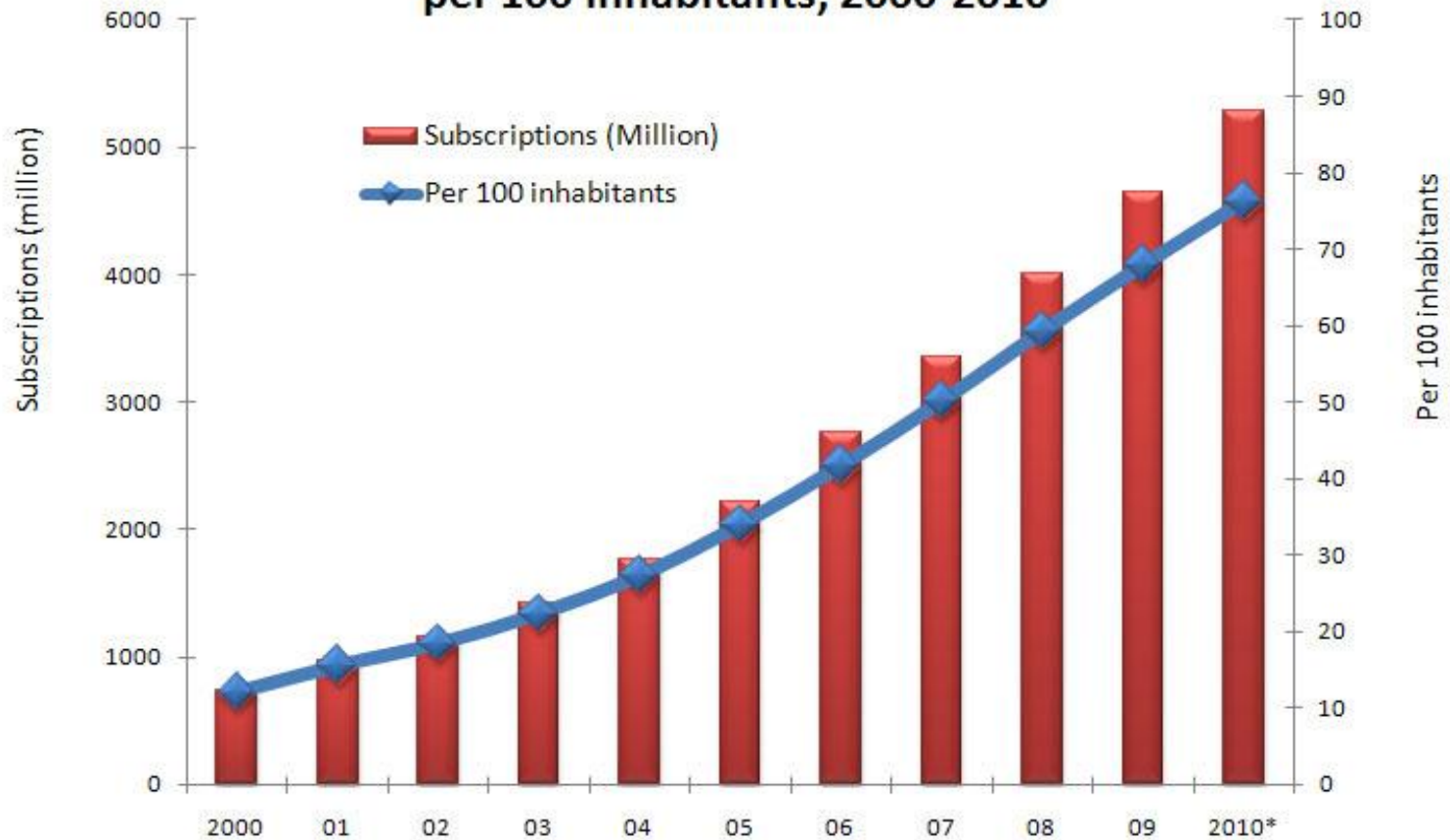 - Learning to fail fast, adapt

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Global mobile cellular subscriptions, total and per 100 inhabitants, 2000-2010
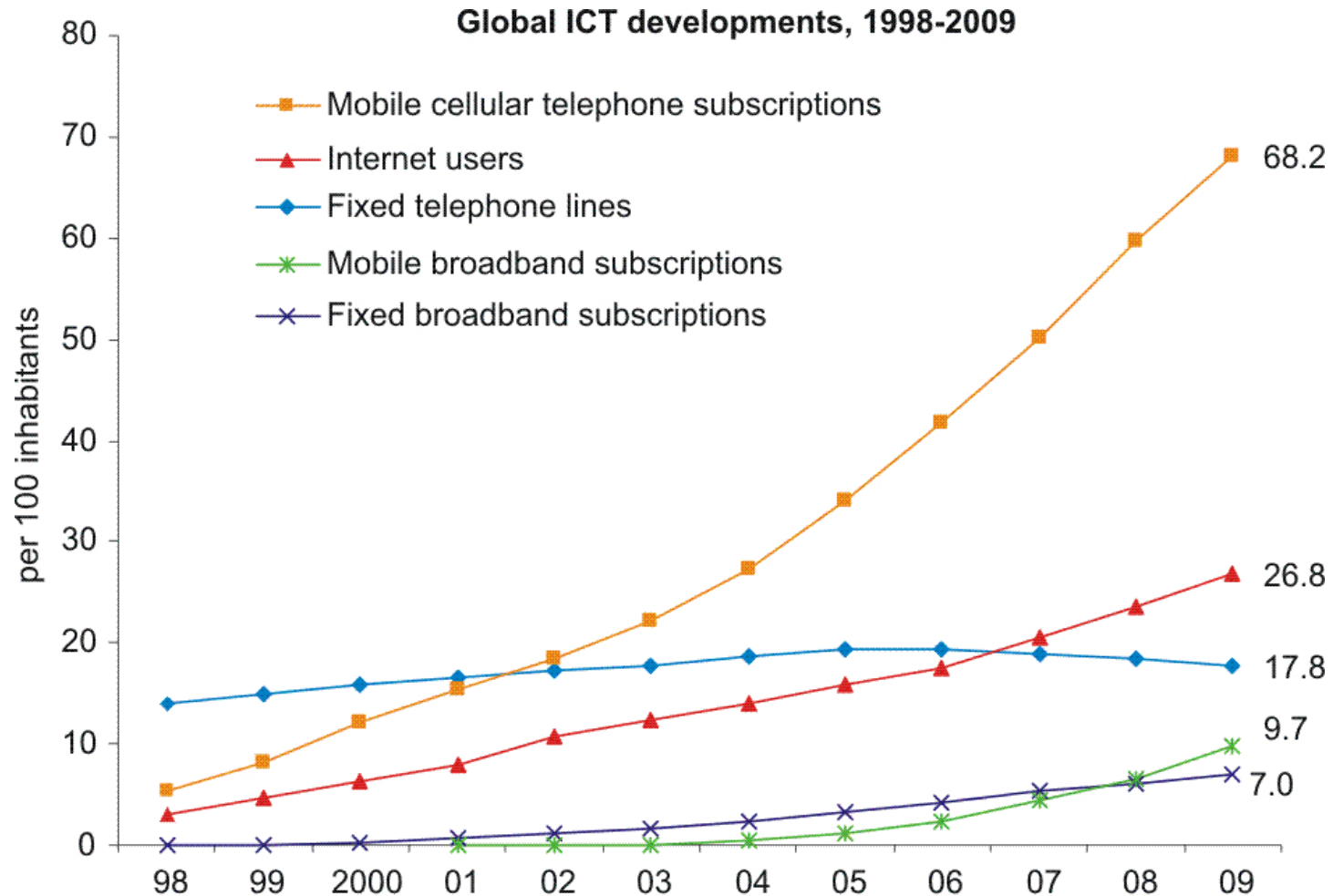
*Estimates
Source: ITU World Telecommunication /ICT Indicators database

II. mHEALTH LANDSCAPE
Mobile far outpacing other options

Global ICT developments, 1998-2009

Legend:
- Mobile cellular telephone subscriptions
- Internet users
- Fixed telephone lines
- Mobile broadband subscriptions
- Fixed broadband subscriptions

y-axis: per 100 inhabitants (0 to 80)
x-axis: 98, 99, 2000, 01, 02, 03, 04, 05, 06, 07, 08, 09

Endpoint values: 68.2, 26.8, 17.8, 9.7, 7.0

Source: ITU World Telecommunication/ICT Indicators database.

II. mHEALTH LANDSCAPE
Sample Applications

DATA COLLECTION & MANAGEMENT
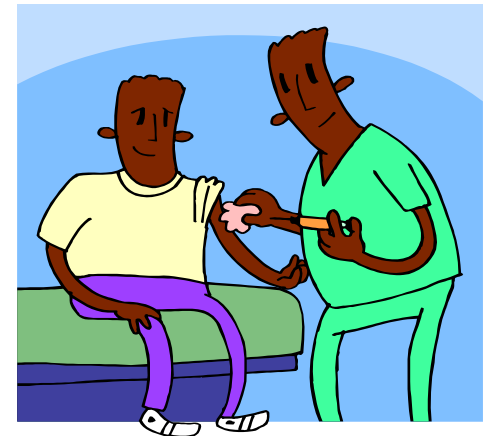
CONSUMER AWARENESS

REMOTE DIAGNOSIS

SUPPLY CHAIN

CLIENT EDUCATION

PROVIDER JOB AIDS
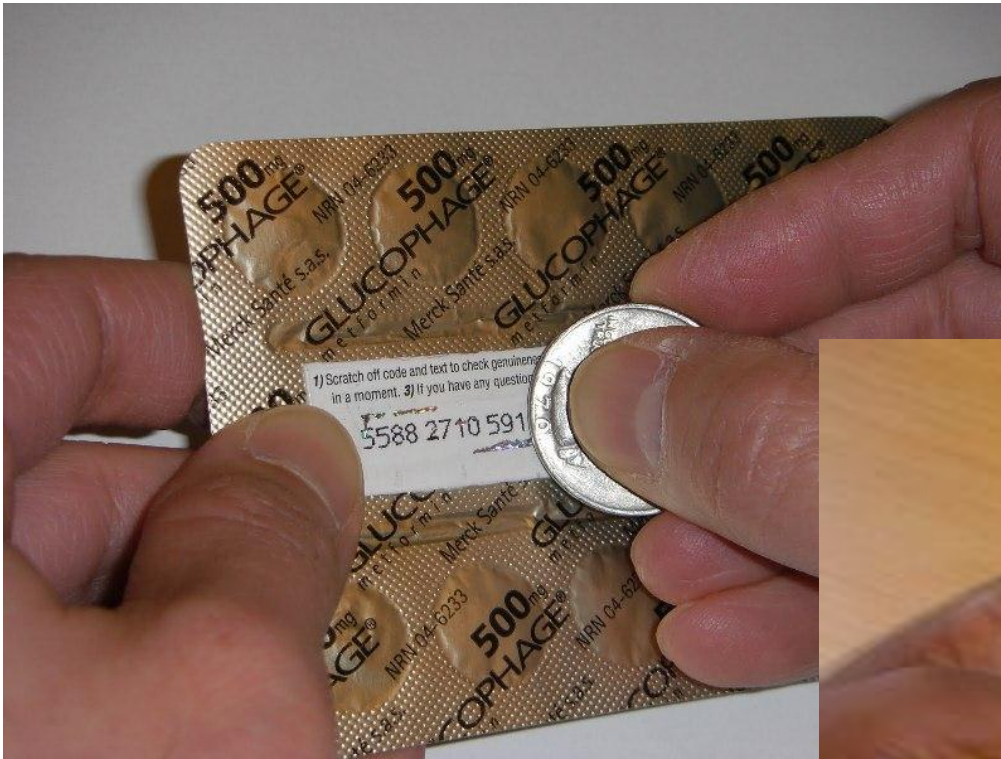
Expectant women/ new mothers sign up for service

Users receive 2 health-related messages weekly

Partner advertising and advocacy will drive subscription levels

"If you have any bleeding during this month, seek medical attention right away"

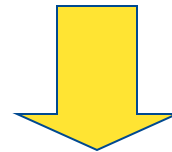*"Your baby needs an immunization this week to stay healthy, available free at all clinics"*

Messages will provide critical life-saving information, leading to improved in health knowledge, behaviors and outcomes

15

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The Case for SMS

Reaches virtually all mobile users

Participatory, two-way interactivity

Can be personalized for the individual

Private channel

Lower cost than voice

Easier to store for future access

SMS Glossary

SMS = texting

SMS server: the hub where messages are sent, received

SMS software: special programs downloaded on computer

Bulk SMS: systems that send many messages at once

SMS service provider: third party specialists, offer range of Value Added Services (VAS)

Push services: term for sending messages to recipients
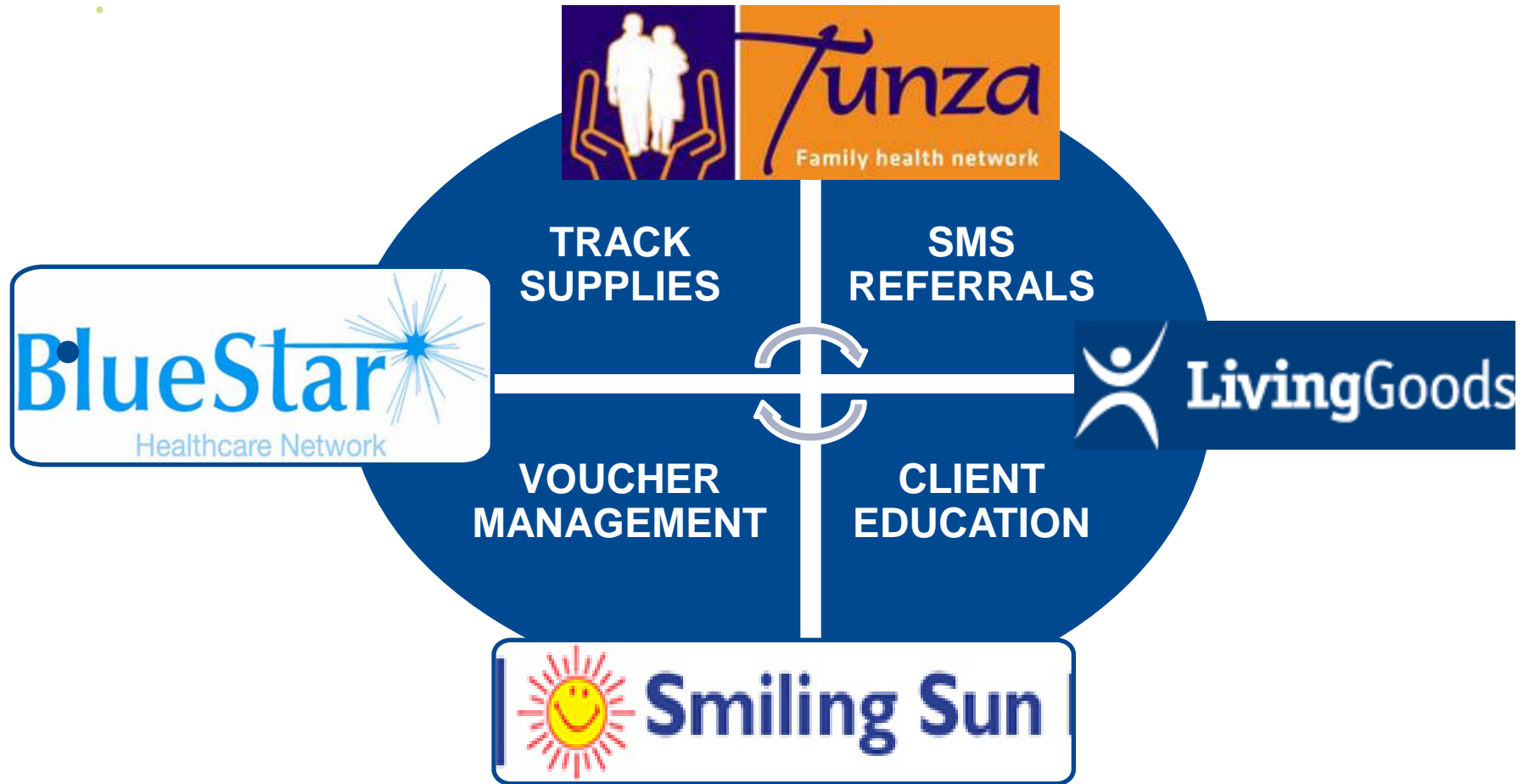
Pull services: users request information from SMS server

Shortcode: 5 or 6 digit numbers from phone companies, monthly rental charge

Longcode: Normal mobile phone numbers, acquired by purchasing a SIM card.

III. FOCUS ON SMS
Limits of SMS

SMS not good approach for

- Low literacy audiences
- Local language requirements
- Client communications needing privacy (e.g. shared phones)
- High volume, high frequency data collection
  - SMS prone to errors
  - Limited by small screens
- Introducing new processes or behaviors
  - Works best when replacing or extending other communications (e.g. paper forms)
  - Cannot substitute for human resources, just extends them

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- *FrontlineSMS: Learn.*
- *The world is your classroom.*
-

IV. FRONTLINESMS: LEARN
Mobiles for Quality Improvement (m4QI)

Problem statement: Limited training follow-up

- Face-to-face is expensive, pulls providers away from clients
- Procedures, skills forgotten over time

Solution: Create SMS assessments platform

- SMS quizzes participatory, interaction reinforces learning
- Identifies gaps in knowledge for follow-up

Extension of FrontlineSMS

- Free to download, intended for "no internet" environment

m4QI Pilot Overview

Scope: 34 FP providers at 6 MSI Uganda locations

Platform: FrontlineSMS:Learn

- Store message by topic
- Quiz feature with automated responses
- Advance delivery schedule

Design: Sent daily messages for eight weeks on 4 topics

- Hand-washing
- Instrument decontamination
- Sharps disposal
- Vocal local (pain management)

"I gave a wrong response to one question and I received instant reply/feedback. The feedback was very clear". **Transport Assistant**

"We used to have boxes which were not puncture proof but now we have ones which are puncture proof". **Clinical Officer**

"People are more serious with hand washing. The project remained as a constant motivator of hand washing". **Outreach Manager**

IV. FRONTLINESMS:LEARN
m4QI Results

- Increased use of training manuals
- Proactive changes
- Next steps:
  - Larger scale deployment
  - Impact evaluation
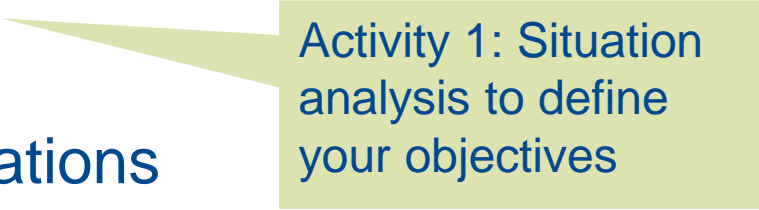 - Additional features

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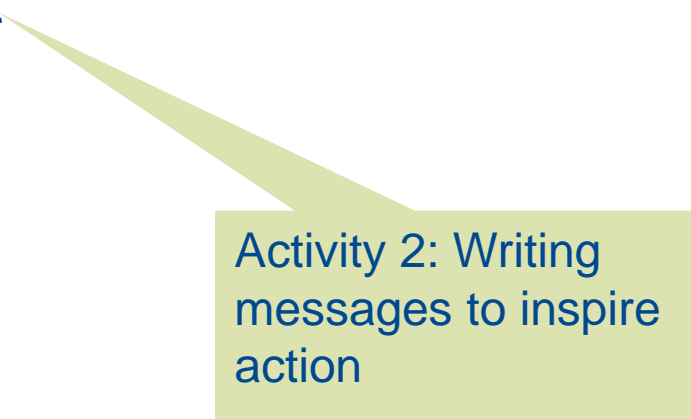
V. TRAINING MODULE
SMS Skills Development Overview

Step by Step Guide

1. Needs Assessment
2. Planning & Budgeting
3. Technology Considerations
4. Content Development
5. Deployment
6. Monitoring
7. Evaluation

Activity 1: Situation analysis to define your objectives

Activity 2: Writing messages to inspire action

- Don't skip this step – common mistake
- Need clarity regarding
  - What is the challenge – what problem are you trying to address and what are you doing about it now
  - What is the best way to reach this audience
  - What is your internal capacity to support
- These are NOT reasons to deploy SMS applications

mHealth is the hot new thing !

Seems like everyone has a phone . . .

V. TRAINING MODULE
1 Needs assessment: Identify Problem

- Link your SMS objectives to current processes
  - Map how SMS messages will make things better, integrate with existing workflows
- Environmental assessment
  - Signal coverage, signal reliability, local language & scripts
- Consider alternatives and trade-offs
  - Peer outreach activities
  - Phone calls
  - Group trainings

- Detailed mobile profile
  - Phone ownership
  - Texting behavior
  - Work setting
- Segmentation
  - Age, education, income – can target subgroups
- Resources
  - Formative research
  - mHealth projects
  - Service providers

- **SELECT TARGET SMS ACTIVITY**
  - One behavior to benefit from SMS reinforcement
- **ALIGN WITHIN EXISTING PROCESSES**
  - How would SMS integrate with current activities
- **DEFINE HEALTH OBJECTIVES**
  - Criteria for funding approval
- **IDENTIFY BARRIERS**
  - What obstacles to anticipate, how could this fail
- **IDENTIFY INFLUENCERS**
  - Stakeholders who would be helpful in establishing

$	Cost categories
Planning	Formative research, stakeholder buy-in
Design	Develop and vet service
Technology	Consultant, laptop, modem, airtime
Deployment	Training, trouble-shooting, updating
Monitoring	Analysis, dissemination
Evaluation	Costs, benefits, targets met

V. TRAINING MODULE
2. Planning considerations: Airtime

- Shop rates with bulk SMS providers
  - Operator discounts?
- Franchisee reimbursement options
  - Reverse billing to project
  - Topping up airtime
  - Cash prepayment
  - Franchisees pay per franchise agreement

- Download from www.FrontlineSMS.com
- Buy SIM card & cable, attach phone/modem

HIRE IT CONSULTANT?

No need . . . usually
- **Software designed for non-technical staff**
- **Valuable to build in-house expertise**

But yes if. . .
- **No staff available with basic tech savvy for trouble-shooting**
- **Planning multiple mobile applications**

MOBILE OPERATOR INVOLVEMENT?

No need. . . usually
- **Standard SIM cards, modems available from local vendors**
- **Training applications not high volume**

But yes if. . .
- **Have customized needs such as reverse billing, toll free**
- **High scale intervention could attract CSR interest**

Tip: Check local computer training programs for low cost help

- Start with formative research
  - What do recipients want or need to know
  - What tone, source, frequency, language, vocabulary
- Collaborate with others
  - Ask: "why aren't they doing the thing in the first place"
  - Vet accuracy and comprehension
- Dealing with the 160 character limitation
  - Does not work with complex training
  - Abbreviations may not be clear
- Pretest pretest pretest
  - Feedback is essential for message acceptability

4. Content example: Formatting Replies

4. **True or False: Sharps can be disposed of in any plastic container that is available.**

User replies: 4 F

→

That is correct! Sharps must be disposed of in a puncture proof container, like a jerrycan, clearly labeled sharps.

8. Which is a good topic for vocal local? A) Progress of the procedure. B) Why client came to the clinic. C) Rhymes or counting songs.

User replies: 8 C

That is correct. Engaging the client in reciting rhymes or singing counting songs are good distracting techniques.

V. TRAINING MODULE
Activity # 2: Content Development

USE TARGET BEHAVIOR FROM ACTIVITY #1

- Competency in need of adherence, part of existing training

DISCUSS THE FOLLOWING

- Why is this behavior important
- Why is the behavior not regularly done
- Why should franchisee/client care about this behavior

WRITE A TEXT QUESTION TO ASSESS KNOWLEDGE

- 160 characters, including spaces
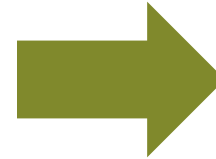- Multiple choice or True/False
-

V. TRAINING MODULE
5. **Deployment**

Software program loaded on laptop

Data entered into spreadsheet

Modem connected to mobile network to send

- User phone numbers
- Message content to be delivered
- Schedule delivery time

Messages sent and received

- Pretesting
  - Prepare checklist of what problems occur, how solved
- Orientation and training
  - Underscore user benefits, what is expected
  - Address airtime, formatting,
- Sending and receiving
  - Need process for keeping phone numbers updated
- Motivating and reinforcing

- Troubleshooting
  - Daily review: is platform working as planned?
  - Are recipients responding, are new encouragements needed?
- Analysis
  - FrontlineSMS:Learn organizes the data to see
    - Percent messages sent and received
    - Correct/incorrect answers by topic, by subgroup
    - How difficult the question is
- Who will use analysis, how often, for what purpose
  - Supervisor follow up
  - New training activities

V. TRAINING MODULE
7. Evaluation

- Need evidence on what works
- Defining outcomes to measure
  - Process versus implementation – consider both user experience and project results
- Scalability and impact
  - Pressure from mHealth advocates who say
    "enough with the pilots"
  - But still in early days, much to learn about what works and why
- Do, learn, iterate, document

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- Celebrate your missteps
- Share, correct, learn
- Lighten up, move on
- Failure is the best teacher

VI. WRAP UP: LESSONS LEARNED
Bloopers I Wish Had Been Avoided

- Buying the wrong modem
- Not knowing airtime lasts just 30 days
- Reversing AM and PM
- Sending messages before explaining why

- **WHAT ARE YOURS?**

Pamela Riley, MS, JD
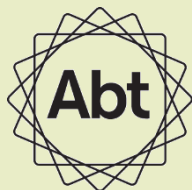**Senior mHealth Advisor**
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