This checklist is intended for Severe Weather events that have some lead time before landfall or reaching an area that impacts your people or business, like hurricanes and wildfires. With the [COVID-19 pandemic](https://support.everbridge.com/articles/Technical_Support/COVID-19-Best-Practices-and-Notification-Directions) overlapping with other critical events, Everbridge has adjusted its best practices for long-term messaging to minimize message fatigue for Contacts and increase message deliverability as organizations worldwide attempt to send alerts to their people.

Please note the differences in this document compared to historic severe weather resources, and that Best Practice recommendations for Priority events that require urgent response differ from these long-term messaging recommendations.

# General Considerations

* + **Consider Sharing Priority and Non-Priority Alerts Differently**
* Consider using limited Delivery Methods for Non-Priority messages, and publicize the change! This may include sending Non-Priority messages to Email, Everbridge Mobile App, and posting to a webpage, while Priority messages go to all of those methods **and** SMS and Phone Calls.
* Post your announcement on a webpage before sending messages. This will give you the ability to insert a link to the message for recipients to visit, and allow you to share non-priority alerts in a separate space to limit non-priority messages.
  + Consider the use of URL shorteners to reduce the length of your SMS message.
* Encourage Contacts to download the Everbridge Mobile App to receive messages on a Delivery Method Everbridge manages for effective delivery during times when first responders have priority over phone lines.
  + **Pre-Plan Awareness Campaign**
* Post in newsletters, flyers, leaflets in utility bills or paychecks and tv displays at entrances, on your internet/intranet, and on Facebook, Twitter, and Instagram.
* Mention the system and recent use cases at town halls and quarterly all hands meetings, and share the [SMS short codes](https://support.everbridge.com/articles/Documentation/Everbridge-Global-SMS-Codes-Doc) that texts will come from for Contacts to save. U.S. public agencies sending messages to US devices should note the [updated SMS sender ID](https://support.everbridge.com/articles/Documentation/New-SMS-Code-for-U-S-Public-Safety-Agencies-FAQ) of 88911 (not 89361).
* List clear reminders about how the system will be branded to minimize phishing reports.
* Outline how Contacts can update their information.
  + **Include Other Departments/Leadership in Preparedness Efforts**
* IT/HelpDesk, HR/Public Relations/Corporate Comms/PIO, Security/GSOC, Business Assurance, Infrastructure/Telecom
* Ensure leadership/management at all locations are aware of impending messaging and expectations

# Everbridge Features to Review

**Settings**

* **Broadcast Timing and Duration**
  + Use a high Broadcast Duration – ideally, the highest setting of 24 hours.
    - This means the system will attempt to reach Contacts who haven’t yet confirmed through this time period and the amount of predefined Cycles. A high Broadcast Duration helps avoid “Confirmed Late” statuses and keeps recipients from receiving a “broadcast has ended” message if they attempt to confirm late via email.
    - Broadcast Duration is important for [Broadcast Throttling](https://support.everbridge.com/articles/Technical_Support/Adjusting-the-Broadcast-Duration-for-Broadcast-Throttling), determines the amount of time a Public or Private [Incident Zone](https://support.everbridge.com/articles/EBU_Course/EBU-Incident-Zones) is active, and should also be the same or longer than the Expires setting for [IPAWS alerts](https://support.everbridge.com/articles/Technical_Support/Sending-an-IPAWS-Message) (for US public agencies).
  + Set a higher-than-usual Interval Between Delivery Methods for non-critical messages
    - Setting the Interval Between Delivery Methods to 3 minutes is appropriate for an update that doesn’t require immediate action to minimize disruption and message fatigue, while a 0 or 1 minute Interval Between Delivery Methods should be used when immediate action is required, for example during an evacuation order when only a few hours remain before landfall. This helps ensure Contacts trust your system and know you’ll only blast them at a rapid pace when there is an imminent threat.
  + Adjust Multiple Cycles
    - Standard practice is to use 1 Cycle to attempt to reach Contacts with pertinent information once, and avoid re-sending old information when new content should be sent. Contacts who don’t see the message at first will still have a missed call, text, email etc.
* **SMS Options**
  + Disabling Title in SMS Messages allows you to remove duplicative content from the Title of a message in the Body. Please note this applies across the organization, so existing templates should be updated to include relevant content from the title in the body and message senders should be instructed to ensure they include relevant content in the SMS body as well.
  + Be aware that if messages are over the limit for one SMS, the “Include Short URL in SMS Confirmation” may be ignored as only one URL will be used in the text to point to a longer message website.
  + Add a short name under the new SMS Message Prefix setting to automatically include your organization’s short name in every SMS to build credibility. If you had manually added short names to your templates in the past, remove those entries and ensure Users aren’t duplicating them in new messages
  + SMS URL Duration determines how long the link available in an SMS longer than one text message is available to click and view online, selecting “5 Days” enables the message to be viewed an additional 5 days after your Broadcast Duration.
  + Header on SMS URL Web Page should reflect the same branding used for your Sender Name in emails and content used to brand your system with your Contacts
  + Adding a Custom Badge to the web page used for SMS messages that take up more than one text allows Contacts who click on your Web Page Message to verify they are reading credible information from your organization. Add the same logo or banner used in emails, the Everbridge Member Portal, or organization-wide branding.
* **Caller ID**
  + Ideally, have your IT provision a custom number with a voice recording (“You have reached XYZ Alerts, if you believe you received this message in error or have any questions…”)
  + Use a real phone number, not 123-456-7890 or 555-555-5555, as described in [Caller ID Best Practices](https://support.everbridge.com/articles/Technical_Support/Everbridge-Caller-ID-Unknown-Callers).
  + Avoid using the Ops center/phone bank to avoid inundation of callbacks on priority lines.
* **Sender Name** 
  + Should be a phrase or unique name for your alert system to appear in emails
  + Using an email address may cause your message to be marked as spam (since email servers typically validate against [noreply@everbridge.net](mailto:noreply@everbridge.net))
* **Email Header & Footer**
  + Use the same branding included in regular emails (logos, hyperlinks, confidentiality notices).
* **Is Confirmation turned on?**
  + Turning Confirmation off means all Contacts receive all messages on all devices without an opportunity to confirm receipt. This can clog your outreach attempts and cause confusion.
* **Configure Broadcast Throttling**
  + Set limits to avoid overwhelming your local telephone provider’s limits for landline calls – use Everbridge’s [Broadcast Throttling](https://support.everbridge.com/articles/Technical_Support/Broadcast-Throttling-Settings) recommendations.
* **Whitelist Everbridge**
  + Avoid email messages going to spam by following Everbridge’s [Whitelisting Best Practices](https://support.everbridge.com/articles/Documentation/Everbridge-Whitelisting-Best-Practices-Doc).

**Contacts**

* **Identify and resolve Contacts with no Delivery Methods**
  + To find [Contacts without Delivery Methods](https://support.everbridge.com/articles/Technical_Support/Finding-Contacts-Without-Delivery-Methods): create a Custom Report with Filters where Delivery Method does not contain Phone, SMS, Email, etc.

**Templates**

**Reminder: Existing Templates *are not updated* when Default Settings are changed. After changing Default Settings, edit your pre-configured Templates as well.**

* **Notification Content**
  + Ensure “Use custom Email/Everbridge Mobile App message” is enabled to create distinct messages per Delivery Method. Add the longer message in the Email box that appears and link to your announcement site in a way that uses branding and rich text formatting so your message is easy to comprehend, as outlined in [FAQs for Utilizing Separate Email](https://support.everbridge.com/articles/Technical_Support/FAQs-for-Utilizing-Separate-Email-Content).
    - Voice recordings should be between 30 and 45 seconds, never more than 1 minute, and recorded by a human voice that recipients know whenever possible.
  + Ensure “Use custom SMS message” is enabled to create a custom SMS message and Web Page Message should the initial SMS go over 160 characters, and consider building a Web Page Message with additional context once a Contact clicks the SMS URL.
    - Remember, messages over 160 GSM/70 non-GSM characters will create a separate Web Page with remaining information, so always build templates and train Users to include the event and a call to action for the recipient at the start of each message to provide relevant context to those who may not have access to the URL from their phone.
  + Consider using limited Delivery Methods for Non-Priority messages. This may include sending Non-Priority messages to Email, Everbridge Mobile App, and posting to a webpage, while Priority messages go to *all* of those methods and SMS and Phone Calls.
  + Notification Templates are tied to an Event (“Hurricane X”) for easy reporting.
  + Post to Social Media with [Publishing Everbridge Notifications to Facebook & Twitter](https://support.everbridge.com/articles/Technical_Support/Publishing-Everbridge-Notifications-to-Facebook-Twitter).
* **Do you have a Retraction template?** 
  + Something with basic “Please disregard the previous message that was sent in error. Details to follow” is handy in the event a message is accidentally sent (or wrong content included).

**Member Portal**

* **If using** [**Everbridge Member Portal**](https://support.everbridge.com/articles/Technical_Support/Configuring-Member-Portal-Mandatory-Fields)**, make sure it’s branded so Contacts trust the page**
  + Agencies that only want citizens who live in a certain area should ensure their Public portal has “Use a Geo-Fence to control addresses” enabled and their jurisdiction loaded to minimize confusion, and verify that “Location” field is Mandatory.
  + Agencies using SmartWeather and the Member Portal should review [SMARTWeather Settings Best Practices](https://support.everbridge.com/articles/Technical_Support/SMARTWeather-Settings-Best-Practices).

**Users**

* **Should all current Users still have access?**
  + Review and adjust User access with [Managing User Roles](https://support.everbridge.com/articles/Technical_Support/Managing-User-Roles).
* **Review De-activated Users**
  + Can identify because they are grayed out
    - Was this on purpose (i.e. on leave), or are they locked out?
* **Are there Users who still haven’t registered?**
  + Registration link expired 72 hours after sending
    - Re-send invite, or delete Users as appropriate
* **Does everyone know how to log in?**
  + Ensure all Users have access to the Manager Portal and to the ManageBridge Mobile App to send messages remotely (available for [Android](https://play.google.com/store/apps/details?id=net.everbridge&hl=en_US) and [Apple](https://apps.apple.com/us/app/managebridge/id565859840) devices).
  + Restore access with [Recovering Username & Resetting Password for Everbridge Manager Account](https://support.everbridge.com/articles/Technical_Support/Recovering-Username-Resetting-Password-for-Everbridge-Manager-Account).

**Resources**

* **Ensure all Users have saved Everbridge’s 24/7 Support and Live Operator information:**
  + Global Technical Support Hotline: +1 818-230-9798 or [support@everbridge.com](mailto:support@everbridge.com)
  + Global Emergency Live Operator Service: +1 818-230-9797
* **Share short refresher videos with Users who haven’t accessed Everbridge recently** (**NOTE**: to access these videos, click link, log in with User credentials, then hit “Refresh” on browser on blank page. Video will then display):
  + [How to: Send a Notification to All Contacts](https://university.everbridge.com/#/online-courses/6ba65dc8-5481-4832-81aa-9fb19dec686f)
  + [How to: Create Rules](https://university.everbridge.com/#/online-courses/b5209982-0aa2-4df0-9179-488b1cc48da5)
  + [How to: Create Groups](https://university.everbridge.com/#/online-courses/39a5b951-f960-44b6-94c3-f14e42e68d85)
  + [How to: Upload Contacts to Multiple Groups](https://university.everbridge.com/#/online-courses/41a0d3a6-bdf4-48bc-a624-19cdeeb7838c)
  + [How to: Upload Contacts](https://university.everbridge.com/#/online-courses/5e50be78-a74d-48be-8d6e-37a6237cb05d)
  + [How to: Back-Up Contact and User Data](https://university.everbridge.com/#/online-courses/e2190d04-8114-4bd0-ad0e-9a5efeb77ac2)
  + [How to: Create Notification Templates Available to Different Roles](https://university.everbridge.com/#/online-courses/54c4fd26-e76b-4470-b8f1-79ff4aab1fbc)
  + [How to: Create a Conference Bridge](https://university.everbridge.com/#/online-courses/dccc6258-87ee-49d9-a596-ac0a98ac0ac2)
  + [How to: Send a Forgot Password Email](https://university.everbridge.com/#/online-courses/418272ea-8532-4272-a5dd-aecdfdd69c3c)