saysimple

EBook

WhatsApp Business

Understand why WhatsApp is best suited to your organization for delivering exceptional CX

How to future proof customer communication

Customer behavior has changed immensely due to the Covid-19 pandemic. Globally we've gone from living off- to online. We had to adapt quickly, but it seems we were readier for it than we thought. Organizations discovered many advantages from doing business online. It is quick, efficient, personal, and easy and we don't have to get off our butts to get what we want. This transition has been much easier thanks to a communication channel many of us already use: WhatsApp. Over two billion people use WhatsApp to send over 75 billion messages every day.

Automations, artificial intelligence, and analytics enrich the use of WhatsApp and the implications for business all over the world. At Saysimple, we help integrate these smart features, which help redeem the pressure of customer contact and reduce costs for your business.

Now, we are heading towards the postpandemic world where many of us can't wait to go out agian. However, consumers have gotten used to a new way of shopping where things get done quickly and easily. It seems the mobile-first shopping experience is here to stay. Therefore, businesses need to get ahead of the game, by upgrading their customer experience strategy to meet the quality standards of the new world ahead of us.

Team up with Saysimple, get ready for the postpandemic world and to future proof your organization.

Remco Vriesema

CEO Saysimple

Table of contents

1.0 Changed consumer behavior

Customer behavior has changed as we've had to move our shopping sprees from off- to online. Instead of going to stores physically, consumers stay in and view product ranges on their laptops or smartphones from the safety of their homes.

This transformation to a mobile-first digital experience has instigated a few interesting trends, which we will discuss here. These insights should help businesses to adapt their brand to the online customer demand.

1.1 Preferences by age

Increase in preference of new digital channels post-lockdown

Channel	Gen Z (18-24)	Millenials (25-34)	Xennials (35-44)	Gen Xers (45-54)	Baby Boomers (55+)
Social media	35%	10%		53%	22%
Chat apps	9%	49%	71%	45%	
In-App messaging			26%	36%	36%

- 🟢 Gen Z (18-24)
- 🔵 Millenials (25-34)
- 🟣 Xennials (35-44)
- 🔴 Gen Xers (45-54)
- ⚪ Baby Boomers (55+)
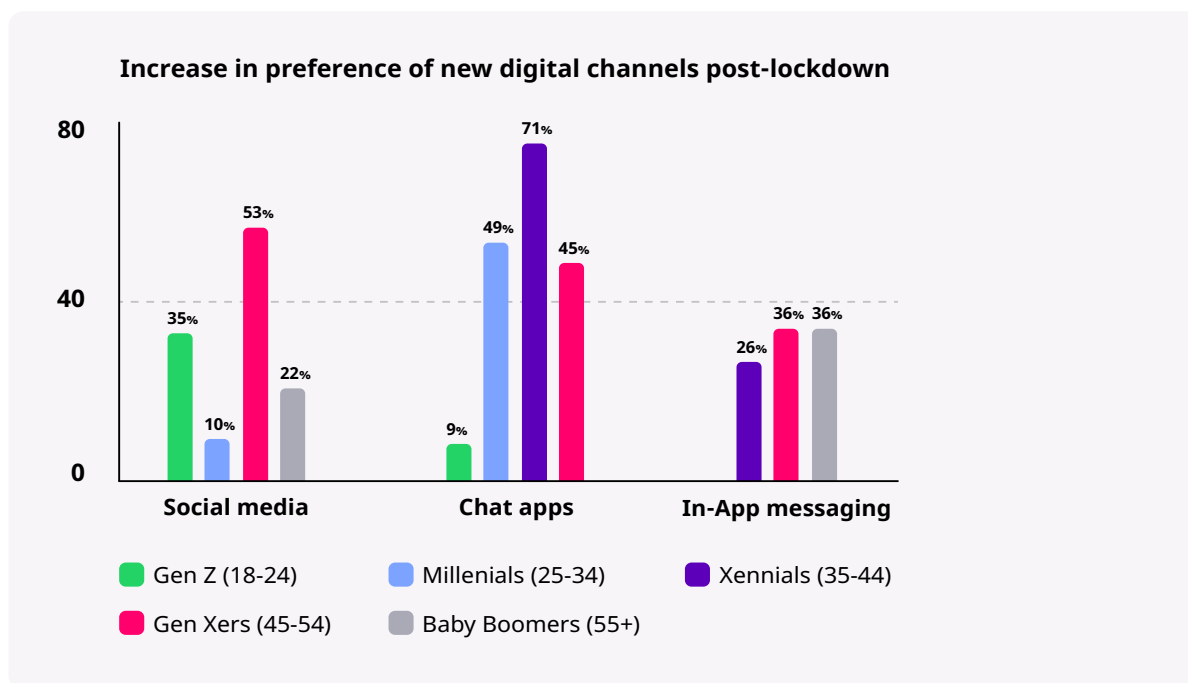
Contact me

For businesses this is an interesting trend, noticing that not only the new generation, known as Gen-Z (18-25 years) are huge fans of the online communication channels, but more age groups welcome the new digital world. Following all age groups, from 18 – 65, one thing is clear, consumer communication became more important than ever since the pandemic.

In order to adjust to the new customer expectations of a post-pandemic world, companies need to know how they can can reach their target audience. Astonishingly, research shows that two age groups, known as the Xennials (35-44 years) and the Gen X-ers (45-54 years), have become increasingly comfortable with mobile-first communications since the start of the pandemic. While their preference for email remains, they are embracing other channels, too. This has led to a 60% increase in WhatsApp usage, and a 30% increase in in-app messaging usage.

2.0 WhatsApp Business
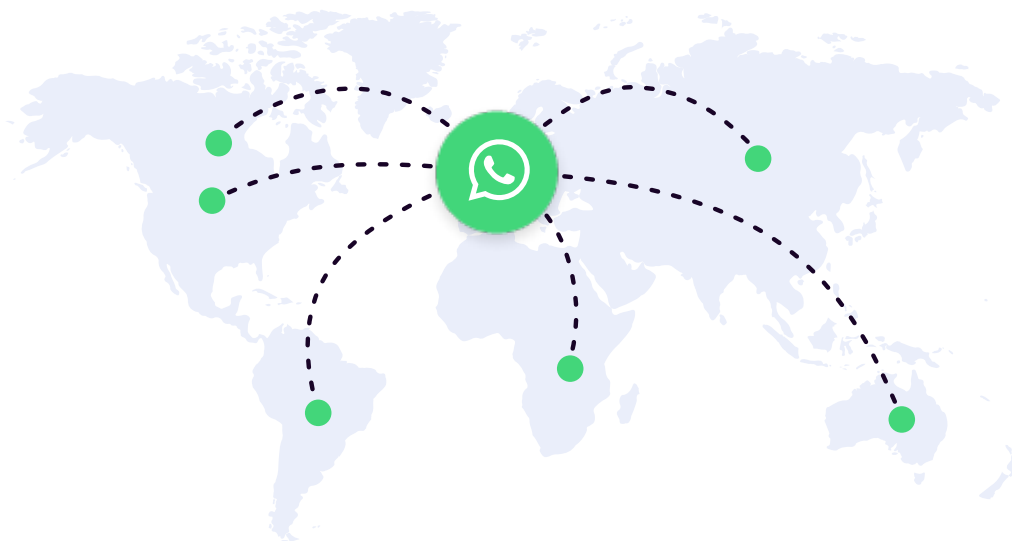
WhatsApp is known as the straightforward messaging app owned by Facebook. This commonly used app is targeted at the consumer, which is why the messaging giant developed a solution for businesses as well. While small businesses are able to simply download the WhatsApp Business app, WhatsApp has developed a scalable API for medium to large businesses.

WhatsApp Business empowers brands to improve their customer experience. The API allows for one-to-one interaction with customers at scale.

The WhatsApp Business API represents an ideal solution for a deeper level of customer care and offers opportunities for sending proactive notifications. Other features developed for companies are automated responses like greeting or away messages, as well as the option to list useful information such as opening hours and locations.

The implementation of WhatsApp Business reduces pressure on your customer service team, increases sales, and removes friction within the purchase process. As a business, you can use your verified WhatsApp Business profile as an extenstion of your brand and earn recognition and trust from your customer.

2.1 WhatsApp: the benefits for businesses

WhatsApp is very accessible and user-friendly which is why many businesses use WhatsApp Business to increase customer satisfaction and lower the pressure on their customer care team.

Other than being a efficient communication channel, WhatsApp Business improves customer experience and therefore your business. How? We've listed 5 benefits.

Reduce friction

WhatsApp reduces friction with your customer: it helps to deliver immediate, personalized and two-way conversations. Let your backend system support a context rich customer relationship, during any customer step such as placing and canceling orders, and providing customer service.

Backup plan

As a business, you don't need to worry about messages not getting through if your customer's handset doesn't accept WhatsApp messages. WhatsApp Business allow you to reach your customers using SMS as a failsafe, ensuring that messages are always delivered!

Secure messages

Messages are encrypted end-to-end. This means it's secure to exchange sensitive information like boarding passes or account details with confidence.

Improved analytics

WhatsApp uses powerful metrics to boost campaign performance and to help you better understand and engage with your customers. Check on tracked deliveries and read rates to keep an eye on ROI, customer response, and satisfaction levels.
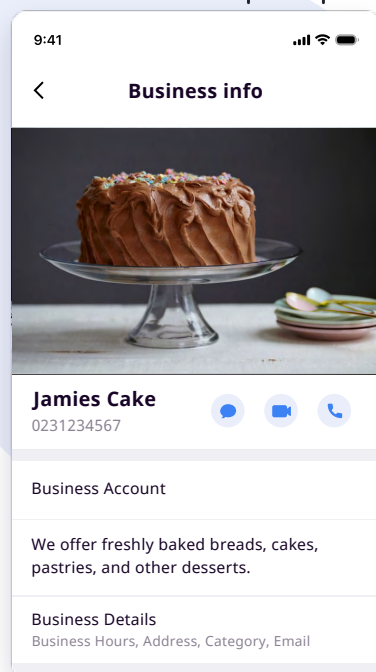
Keep it personal

Finally, the messaging channel offers improved loyalty and increased engagement with your customers. It will help you build better relationships and differentiate yourself from the competition by sending rich, personalized messages with endless possibilities.

2.2 WhatsApp Business features

WhatsApp Business has created a few specialized features for businesses to add extra value to their service.

✓ Business Account

With a WhatsApp business account, you can help customers to learn more about your company by filling out your business information, including your business website, address and opening hours.

✓ Bring Your Own Number

While it may seem trivial, the phone number is one of the core elements for a WhatsApp Business Account. Though outside the app, the API supports mobile, landline, and toll-free phone numbers, which can be really handy for companies who prefer leveraging their existing hotline number to handle WhatsApp inquiries.

✓ Quick replies & away messages

The Quick replies feature lets you save and reuse messages you frequently send so you can easily answer common questions without losing valuable time. If you are unable to answer inquiries, you can set an away message so your customers know when to expect a response. You can also create a greeting message to introduce your customers to your business.
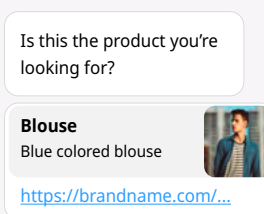
✓ Statistics

To provide you with insight, WhatsApp gathers statistics on the number of messages sent, delivered, and read successfully. This will help you improve your customer care strategy.
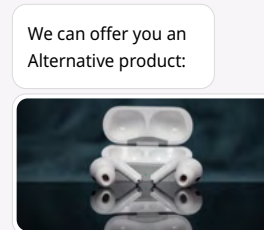
9:41

Business info

Jamies Cake
0231234567

Business Account

We offer freshly baked breads, cakes, pastries, and other desserts.

Business Details
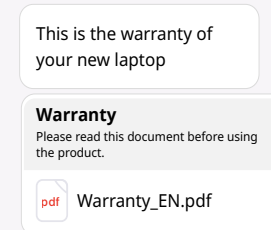Business Hours, Address, Category, Email

2.3 WhatsApp Content types

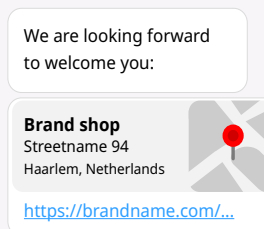**Within WhatsApp Business you can easily choose from multiple content types to share with your customer.**

Is this the product you're looking for?

Blouse
Blue colored blouse

https://brandname.com/...

1 Link

We can offer you an Alternative product:

2 Image

This is the warranty of your new laptop

Warranty
Please read this document before using the product.

pdf Warranty_EN.pdf

3 Document

We are looking forward to welcome you:

Brand shop
Streetname 94
Haarlem, Netherlands

https://brandname.com/...

4 Location

You can listen to our latest interview.

2:34   14:30

5 Audio

We can offer you an Alternative product:

6 Video

Your package is expected to be delivered tomorrow.

Track page

Contact us

7 Interactive buttons Call-To-Action

Would you like to receive notifications via WhatsApp?

Yes   No

More information
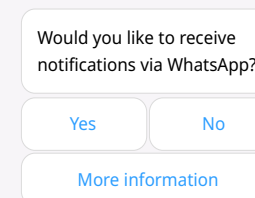
8 Interactive buttons Quick Reply

Are you happy with our service?
1. Not really
2. Neutral
3. Yes!
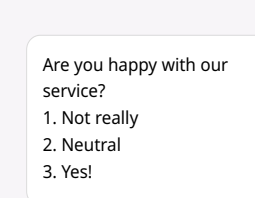
9 List

2.4 Client communication

WhatsApp Business API is the gateway to better customer communication. Companies will improve on customer engagement and it will help them gain trust and enable them to create long-term relationships with their customers.

Working with WhatsApp Business will help you:

✓ Deliver better Customer Service

Offer always-on support and send useful notifications with Saysimple as your WhatsApp Business solution partner.

✓ Be where your Customers are

Customers want to connect with businesses on a familiar platform that is fast and reliable. WhatsApp is the most used channel for consumers worldwide and 90% of those customers say they want to engage through messaging. This makes WhatsApp the ideal channel for businesses to be where their customers are at.

Businesses using WhatsApp Business API can communicate with their customers in two ways:

Through customer-initiated conversations

Respond to customer-initiated conversations over WhatsApp for free within 24 hours of the first message being sent. Enable your contact center agents to:

- Provide quick, conversational support
- Get instant feedback
- Resolve issues in one-on-one conversations

Through proactive notificiations

Use media message templates to create rich notifications that include downloadable documents, images, videos, or location sharing, so you can:

- Share package delivery locations
- Send e-receipts
- Share e-tickets for events
- Onboard customers with educational videos
- Share downloadable boarding passes
- Send real-time financial transaction alerts

2.5 WhatsApp Message Templates

A WhatsApp message template enables businesses a way to proactively reach out to their customers. You can create different message templates, depending on your business needs.

Types of message templates

✓ **Simple, text-only notifications**

Such as account statuses or delivery reminders.

✓ **Rich media notifications**

Such as e-receipts, boarding passes, and onboarding videos.

✓ **Interactive notifications with buttons**

That direct customers to perform an action such as visiting your site, contacting your support team, or scheduling appointments.

Once your interactive message templates have been created and approved, you can use them in notification messages as well as customer service messages. There are 2 types of predefined buttons:

1 **Call-to-Action** — Allows your customer to call a phone number and visit a website

2 **Quick Reply** — Allows your customer to return a simple text message

AIR *INT.*

Joanne Miller
Flight Gate
EF114 F4

pdf Boardingpass_EF114.p

- - - **Header**

Hello Joanne, here is your boarding pass for flight number 114. Thank you for flying with us.

To manage your reservations, sign in to the travel portal.

- - - **Body text**

- - - **Footer**

Contact Us

Track Your Flight

- - - **Buttons**
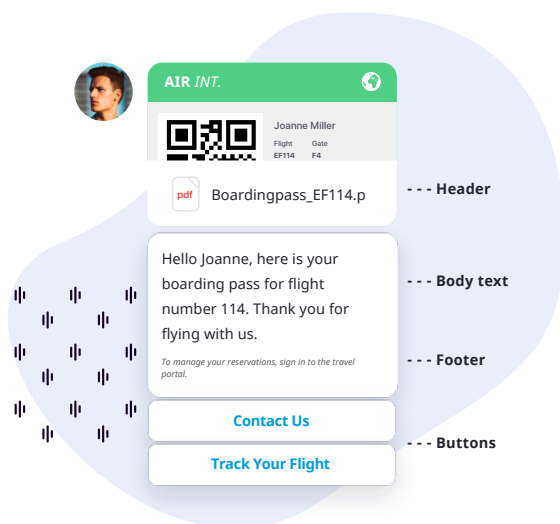
2.7 The 24-hour customer care window

When a customer replies to one of your messages, a 24-hour support window opens and during that time you can freely and authentically communicate with that customer without using WhatsApp-approved message templates.

When responding during the 24-hour window, WhatsApp allows businesses to use automation. But only if an escalation path leads to a customer care agent. Escalation paths include a phone number, email, web support or a support form, among other things.

There may be cases, especially when you're using WhatsApp for customer service, that you need more than 24 hours to process an inquiry or answer a question. When this happens, you might need to send a message template to re-engage with that specific customer, prompting them to answer it, thereby activating the "support window" again.

To handle a situation like this, you might consider creating template messages like this one:

We have news regarding your flight ticket, please respond if you'd like an update.

We're sorry for the wait, it's always a lot busier during the holidays. If you'd like to continue this discussion, please reply with "yes"

I've checked with our company policy and I've found the answer to your question. If you'd like to continue this conversations, reply with "yes"

2.8 WhatsApp Business opt-in

Opt-ins play a crucial role in WhatsApp business-to-customer interactions, and they must be active - that is to say, they must be triggered by user actions like entering a phone number

or checking a box to indicate consent. This can be done on any channel that your business uses to communicate with customers: your website, app, email, SMS, retail location, etc.

It is your responsibility to collect and store customer opt-ins, ensuring that every customer you communicate with on WhatsApp Business has agreed to receive messages from your business. This even includes existing customers, who have to explicitly agree to receive WhatsApp messages from you. In the following pages, we'll explain and give best practices for using opt-ins.
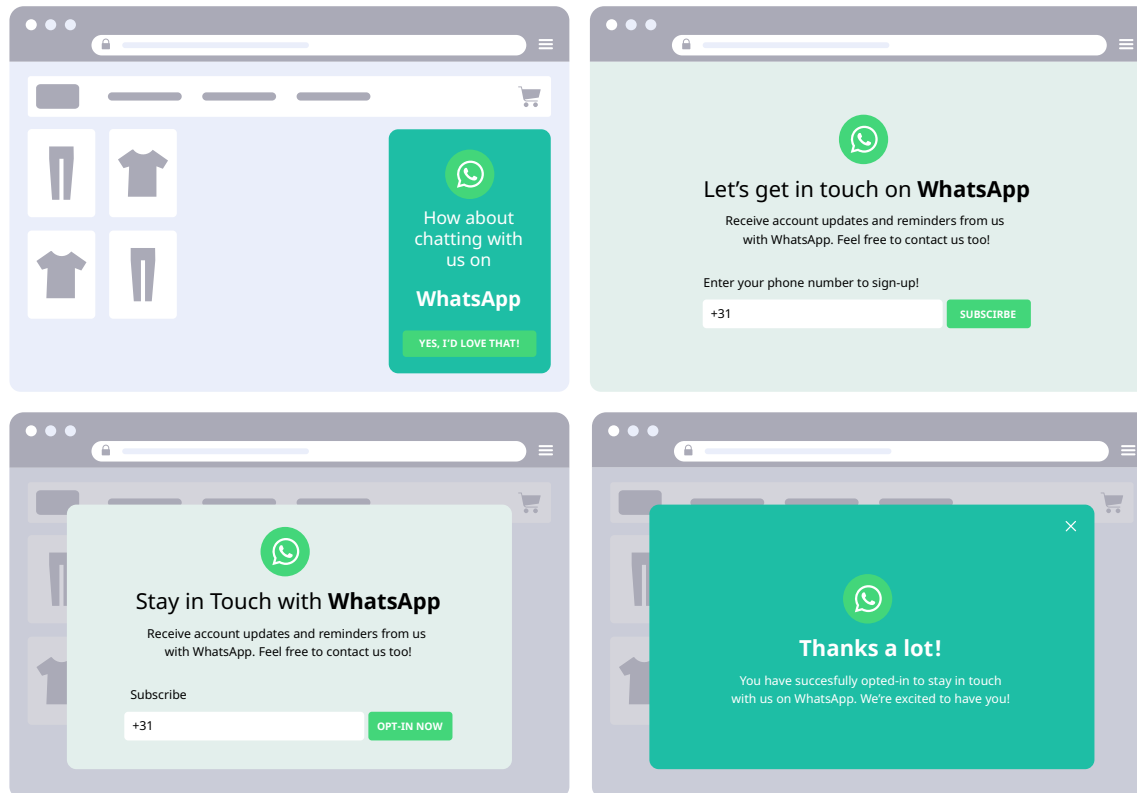
Let's start with how to collect opt-ins. The important thing is to make opt-ins easy and accessible, and to explain to customers how your company uses WhatsApp.

Get your customers to opt-in

Your customers already want to talk to you on WhatsApp, so promoting the app on your relevant customer touchpoints will most probably increase your subscribers. Make sure you clearly communicate how you will use this channel (remember, no spam!) and make your opt-in simple for your customers and staff.

Increase opt-ins, avoid opt-outs

It's essential to stick to your use cases and make this channel relevant for your customers. Your team should be ready to take messages from your customers without hesitation! Make sure you set guidelines on how your agents will support your customers on WhatsApp to sustain and boost your growth.

Stay in Touch with **WhatsApp**

Receive account updates and reminders from us with WhatsApp. Feel free to contact us too!

Subscribe

+31

OPT-IN NOW

The opt-in must be an active opt-in

This means it must be triggered by a user action, such as entering a phone number or checking a box to indicate consent.

Clear messaging

Any messaging used in the opti-in form must be clear so the user knows exactly what they are signing up for and what type of information they will receive once they have consented.

Keep it visual

The user must be asked to opt-in via a visual element (checkbox or similar) shown next to the WhatsApp name and logo on your chosen third party channel.

User control

The user should be able to control what number is used through an explicit action (e.g. editing). In addition, you must state what information will be received next to the User Interface elements. It should make specific reference to the information being sent as messages on WhatsApp.

Spam is a no-go

Remember, all WhatsApp Business messaging must be customer service-related or customer initiated. Any form of spam is a strict no-go.

Create your account

Name

First | Last

Email | Password

johndoe@maill.com |

Phone number

+31

Yes, I would like to receive...

☑ A newsletter

☑ Jpdates via WhatsApp

REGISTER

2.9 Privacy by Default

Today's customers gravitate toward trustworthy brands that deliver personalized and frictionless experiences. Unfortunately businesses from corporate and enterprise levels have a serious problem when it comes to trustworthiness - a majority of customers don't trust them to securely manage their data or respect their privacy.

For instance, 68% of consumers feel concerned about their security on the internet. Most of them are nervous about banking/financial transactions and online shopping.

Four solutions to your customers' privacy concerns

68%
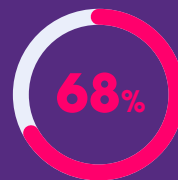
of consumers **feel concerned** about their security on the internet

1 Verification Badges

Badges are used to reassure customers they are communicating with a verified business account they can trust.

2 Two-Factor Authentication

Two-factor Authentication is used to help customers verify their identity to the business for important transactions.

3 End-to-End Encryption

WhatsApp's end-to-en encryption protects conversations. The only people who can view an exchange are the customer and the business with all messages/media auto deleted after a set period of time.

4 Secure & Trustworthy

Since WhatsApp Business requires companies to pass a rigorous approval process before creating a branded business profile, customers can rest assured knowing that business accounts on the platform are verified and thus trustworthy. WhatsApp is continuously adding new security features, such as disappearing messages to make it possible for users to choose a period of time (1 hour, 1 day, 1 week, 1 month or 1 year) for messages to automatically disappear.

3.0 WhatsApp in the Customer Journey

With WhatsApp Business your entire customer journey can be conversational: from the discovery phase, to the purchase phase, to the postpurchase phase. By using your messaging channels effectively, you will acquire, support, and retain loyal customers.

During the customer journey you want to reduce friction where possible. A cohesive customer experience across the whole customer journey is imperative!

The key thing is to focus on how WhatsApp can help your business:

Leverage your Customer Experience (CX) as a primary channel for specific demographics. Understanding your own customers will give you insights on what channels should be prioritized based on age and/or location.

Replace traditional channels that do not deliver the pursued results anymore, like webfo rms and email. If they are hindering your CX, replace them with WhatsApp or other digital communication channels.

Complement your existing channels, where they lack multimedia functions (e.g. SMS and email), speed (e.g. Interactive Voice Reponse (IVR)), email, website, personalization (e.g. website) and more. For example, WhatsApp can be integrated into your Interactive Voice Response tree to deflect customer calls to WhatsApp, instead of the contact center.

3.1 The awareness phase

Consumers expect a smooth experience and outstanding support across every stage of the customer journey. In the Discovery stage, customers discover the brand and its products, and expect to find clear, concise, relevant information across all channels. This phase is important for customer engagement. Considering that over 81% of the consumers want to contact the company to ask about a product or service prior to purchase.

Engage your customers

WhatsApp Business offers a user-centric channel where the customer drives the conversation and not the business. Which is why there's no point in spamming customers with product information just because the company has seen some website activity from that individual. Instead companies can add easy, non-intrusive WhatsApp conversation starter buttons for key content, which lets customers get product information at their own pace.

Ease friction

The main friction point in Discovery is findinginformation on relevant products without a helping hand. While shopping online, customers can become easily overwhelmed by the sheer volume of products options. WhatsApp Business helps personalize interactions to reduce friction in the Discovery phase.
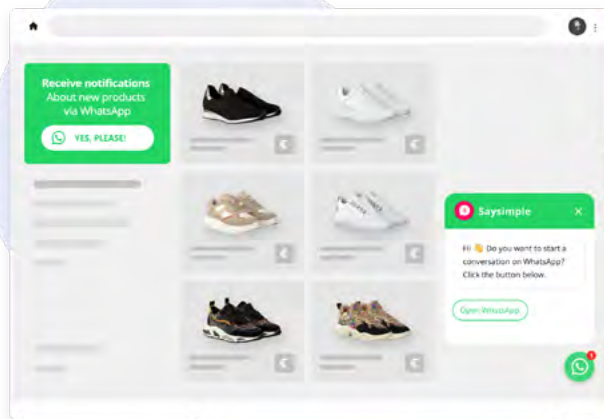
Top pain points in the awareness phase	Reducing friction with WhatsApp
> Prospect unaware product/ service exists	**Click-to-Chat:** Personalized ads for direct conversation with chatbot/agent about the offer on Facebook or Instagram ads
> Lack of detailed product information > Lack of product usage advice	**Conversation starter button:** WhatsApp call-to-action (CTA) integrated on website where customer can request more product information
> New products not easy to spot/locate	**Personalized Shopping:** concierge-like shopping and self service via chatbot **Product links:** when a user expresses interest in purchasing an item or service, share product links to help them complete the transaction
> Can't chat or ask for help	**Customer service:** Automatically connect with an agent for more detailed information
> Being asked for too much personal information	Once the user's account is linked to WhatsApp and relevant customer data is on the company's CRM, it's not necessary to ask so many questions

How WhatsApp reduces friction for main pain points in the awareness phase (pain points information from Facebook IQ).

Finally, to optimize CX we recommend mapping out your business' customer journey, checking which customer channels are currently used and creating an overview of the pain points inside the journey.

When considering using WhatsApp Business, you need to find out h ow communication channels can add value to your company. You can also decide to add WhatsApp Business to your existing channels or slowly replace them.

Following these steps will help you gain insights in your current customer journey and it will show you how WhatsApp Business is helpful to reduce friction. In the end it should result in a higher customer engagement and it will incr ease sales.

3.2 The purchase phase

The Purchase stage might be the trickiest phase in the buying process. Long wait times, clunky or ineÃfficient point-of-sale systems, multiple web forms, and transaction failures can make the path to purchase unnecessarily cumbersome.

Abandoned shopping carts no more

As consumers consider which products they want, any number of factors - from unclear delivery options or shopping carts that don't save items, to hidden charges or too many clicks to finalize a purchase - can keep them away from completing the purchase.

It's no wonder that a key issue in online shopping remains abandoned shopping carts: After the consumer has become aware of the products and considered them for purchase by adding items to their shopping carts, they don't follow through to checkout.

Prevent purchase friction

How can companies prevent purchase friction to convert sales in a faster way? According to the data shown iin figure 5.1 over 74 % of consumers already expect to make a purchase via a social messaging app

There are areas where WhatsApp has no influence, like how checkout processes are built, but the messaging application is perfect for providing proactive communications. Helping customers find theinformation they need, e.g. shipping costs, and provide automated, conversational shopping experiences that can simplify the purchasing process.

Stephanie

Your order of **PUMA RS-X3** has been shipped! Track down your package using your track & trace number:
1S247D03008

Type message here
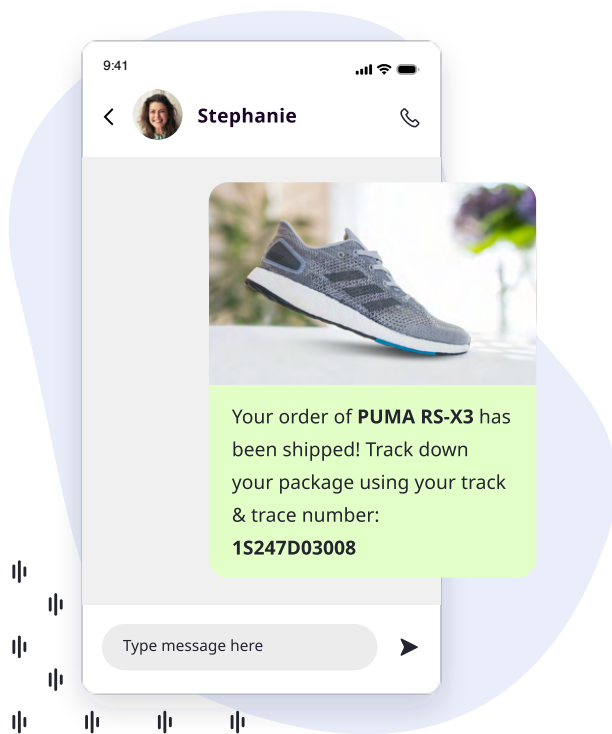
Personalization

WhatsApp-powered personalized shopping is on the rise, a trend triggered primarily by mobile first shoppers—largely Generation Z and Millennials—who are falling out of love with traditional touch points such as websites and email. Instead, they are demanding a more personalized service delivered to their smartphones via messaging. Personalized shopping or a product finder help customers in their request for a more personalized service.

Personalized shopping

For retailers, the deployment of conversational commerce will help to deepen customer relationships and compete with businesses who are still using traditional CX channels. From fashion ecommerce and cosmetics retail to sourcing everyday household items, customers can request information and order goods using their preferred messaging platforms. Personalized buying journeys are powered by chat bots for simple requests or human agents acting as 'personal shoppers' for more bespoke service.

Product finder

For consumers, a product finder may help them filter the otherwise overwhelming sea of choices based on their preferences in a conversational setting. Shoppers can avoid browsing through hundreds of pages, and instead see the products they are interested in quickly and efficiently.

Example: Guided Selling with WhatsApp

Not everyone has time to browse all your product choices. The use of interactive buttons (1) and lists (2) are a great way to narrow down choices and help Emma get what she needs. By showing where she can purchase shoes (3) , Emma has everything she needs to buy the running shoes she needs.

Hi! I'm looking for a new pair of running shoes.

Perfect, are you looking for running shoes for

| Women | Men |

(1)

Women

Women , okay.
Do you have any specific functions in mind? (Multiple answers possible)
1 Water-resistant
2 Cushioning
3 Reflective

1 2

Water-resistant and cushioning, perfect. Do you want any other benefits?
1 Easy On & Off
2 Natural Motion
3 Breathable

(2)

1

It looks like we found some options!

Your personal options
The following options match your requests.

https://sneakrs.com/yourpers...

Revolution 7 looks good! I would like to try them on in one of your stores.

No problem! What is your zip code?

9104EM

This is our nearest store:

Sneakrs
Wilderingstreet 147
9084AD

(3)

https://sneakers.com/yourpers...

Emma Smith
Female, 28 years old
Lives in the city

Emma is a very athletic woman, she trains to stay in her best shape. When choosing new sportswear she appreciates the knowledge of an expert.
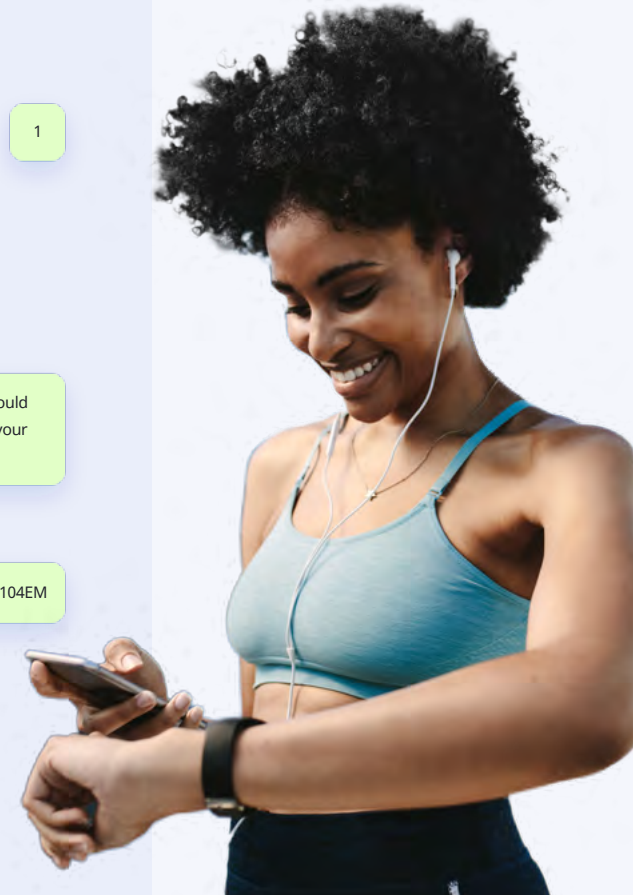
Example: Order via WhatsApp

With WhatsApp ordering food is simple. Restaurants can share the menu as PDF (1) or URL, customize the order with extra information via Interactive Buttons (2), confirm the order (3) and track delivery (4). All of this with a personalized connection using media and branded stickers (5).

Hello, I'd like to order some sushi.

Hi Michael, welcome back to Mato Sushi! Please select your dish by the number in our menu (PDF).

(1) menu_mato_sushi.pdf

C4 Combi salmon and tuna menu

Okay, any extras? Extra Wasabi or edamame?

(2) Wasabi | Edamame

Edamame

Okay, I added it to your cart. Would you like something else?

No

Okay. Same delivery address as last time? St. Boroughstreet 142, Amsterdam?

Yes

Okay. Let's review your order:
1 x Combi salmon and tuna menu with extra edamame for €21.
Confirm order?

Yes

(3) Thank you for your order. Your delivery is on it's way!

(4) Track delivery

Michael Colben
Male, 33 years old
Lives in an apartment in a big city

Michael job is always busy. This is why he relies on the services of takeaways and deliveries. It's easy and quick.

Order Confirmations & Co.

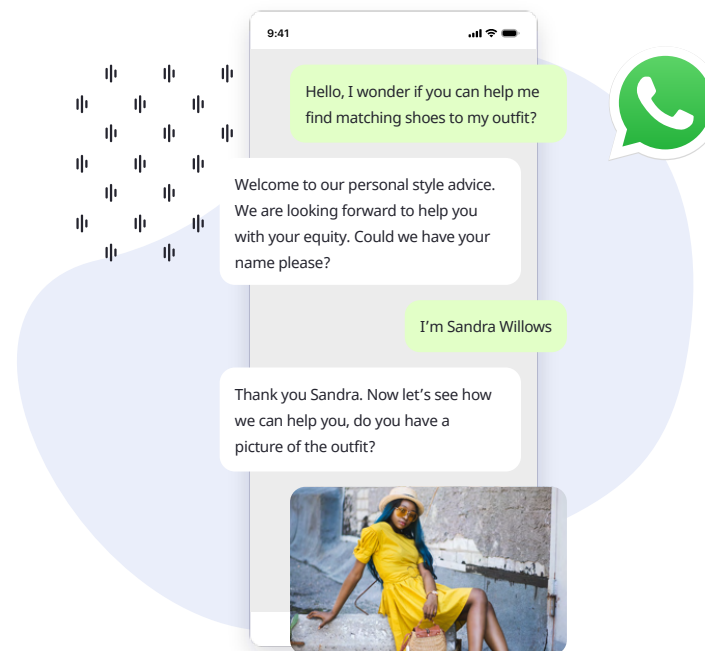WhatsApp Business is a two-way communication channel that is useful for customers to ask questions right away on the chat app, instead of sending an email or calling the contact center. It also means that companies can send time-sensitive messages that the customer needs to check out right away. Replacing existing email content, such as order or shipping confirmation

Being a two way street, it is possible for companies to engage with the customer and to provide extra useful information in the conversation. Such as order and payment details, delivery updates, and tracking URLs.

This means that the "order confirmation" message can be more than a "Thank you for your business" and instead an overview of the purchase.

Messaging is clever way of engaging the customer right away and opening an actual channel of conversation, instead of sending an email that probably won't be opened or read (remember: only 25% of emails are opened). The same principle applies other kinds of notifications about the customer's order, lik e order cancellations or any other r elated changes

In case of an order cancellation, the notification can be automatically sent when the customer or shop owner cancels the order. The customer may receive a list of which products were cancelled and the message could also provide information on how the payment will be refunded.

9:41

Hello, I wonder if you can help me find matching shoes to my outfit?

Welcome to our personal style advice. We are looking forward to help you with your equity. Could we have your name please?

I'm Sandra Willows

Thank you Sandra. Now let's see how we can help you, do you have a picture of the outfit?

cr°sp

Making Notifications Conversational

Customers can approach Supermarket-app Crisp via email, telephone, Facebook, Instagram and WhatsApp. In 95% of the inquiries, all customer communication is done via WhatsApp.

WhatsApp gives Crisp the opportunity to interact quickly and personally with its customers, and makes it possible to remove friction at various points in the customer journey.

Crisp is also a high roller when it comes to WhatsApp templates. They use WhatsApp templates to manage customer expectations by sending them proactive notifications regarding order updates and delivery. And if something is wrong after delivery, customers can easily take action by getting in touch via WhatsApp.

3.3 The postpurchase phase

Once payment is completed, consumers expect rapid ful fillment and status updates, including purchase information and delivery timeslots—and support for their product or service. Post-purchase friction occurs when consumers experience unexpected barriers to receiving products or services, or are unable to easily access the guidance needed to use or repurchase the product.

No matter the industry, Post-purchase customer service is essential for **sustainable growth.** When consumers face difficulties with a newly purchased product or service, such as struggling with delivery tracking, missing packages, or even damaged items, a proactive communications strategy must be in place.

Just as it is important for consumers to shop and browse on their own terms, it is equally vital for consumers to be able to return their purchases easily and to be rewarded for their loyalty

WhatsApp Business is a great fit for customer support; over 75% of consumers want to get product or service support via messaging. Companies can handle a wide range of use cases—from complaints to proactive notifications to keep the customer up-todate every step of the way, to help reduce costs and increase customer service efficiency.

WhatsApp offers the possibility for:

✓ Customers to send photos and PDFs of their query, enabling a more efficient and personalized customer support experience.

✓ Agents to address multiple customer service issues at once, increasing agent efficiency, via the platform.

✓ Companies to shift user inquiries away from more costly channels, like voice calls. (call deflection).

	Awareness & Consideration ❯	Purchase ❯	Care
Objective	Run campaigns using ads that click to WhatsApp, offline advertising, etc. Respond to high-intend customers	Send customers important, timely messages following a transaction	Respond to customers who want to support for a product or service
Customer need	**81%** of consumers message businesses to ask about a product or service	**74%** of consumers message businesses to make a purchase **83%** of businesses experience higher click rates	**75%** of consumers message businesses to get support for a product or service

Off the API   Conversation through the API

Customer centricity is key

Most brands get it by now: creating a delightful customer experience is key to their success. And today, customers demand service how, when, and where they want it. According to market analyst Gartner, "a superior CX is one of the few remaining means of sustainable competitive differentiation." Meaning customers want a cohesive, frictionless experience, regardless of their channel of choice.

Customers don't want to call companies for support, and they certainly don't want to navigate through tortuous IVR systems. They just want answers via their preferred channel. The place where they can get a quick response to their questions as shown in the example where Marc wants to know where his suit is . WhatsApp accelerates the uptake of chat messaging as a customer service channel.

Customer Action

Brand Action

Backend system

Marc has ordered a suit from an online retailer but the item hasn't yet arrived

Marc inquires the whereabouts of hisorder.

Agent checks the latest information and provides a delivery update for the next day.

Marc lets the agent know that heactually needed the suit for an event on the same day. He wants to return the item and asks how to do so

Agent cancels the order and issues a coupon for the next purchase.

Agent Chat Interface

Customer Relationship Management

Agent Chat Interface

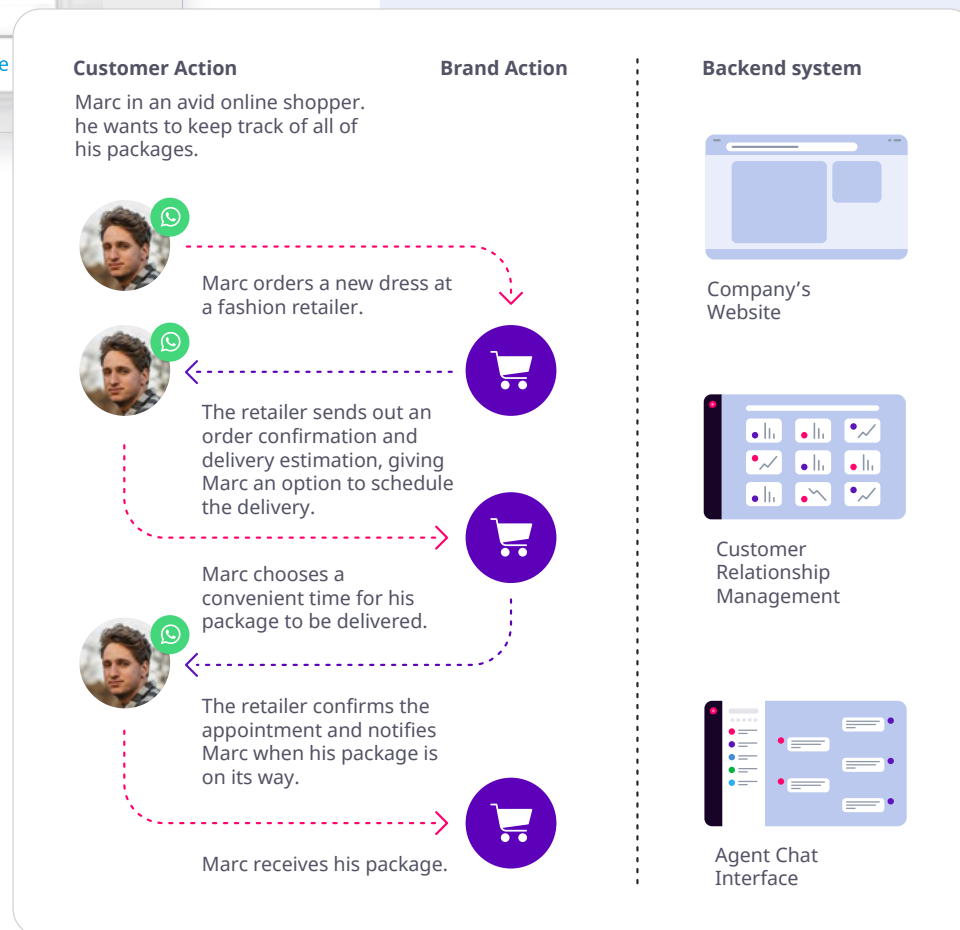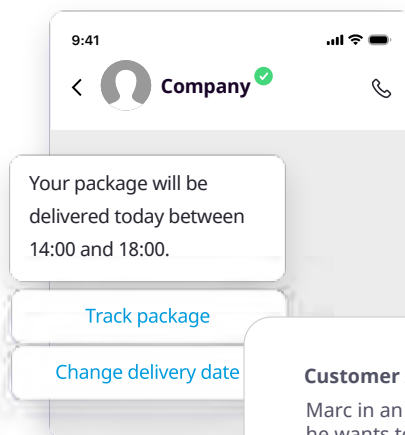# Service notifications

While shipping notifications have become rather a standard practice for companies selling products and/or services online, appointment scheduling for parcel delivery can still be hard . With WhatsApp, companies can easily allow parcel appointment scheduling from booking to cancellation and rescheduling, whenever needed.

At the same time, appointment scheduling and updates can also be applied to a service. For example, as a means of engagement, automotive dealers can send inspection reminders to drivers, inviting them to book a service, for instance a car inspection, directly on WhatsApp.

From there on, customers can acquire information about the inspection costs and timeframe, while scheduling the appointment directly on WhatsApp.

9:41

Company

Your package will be delivered today between 14:00 and 18:00.

Track package

Change delivery date

Customer Action

Marc in an avid online shopper. he wants to keep track of all of his packages.

Marc orders a new dress at a fashion retailer.

Marc chooses a convenient time for his package to be delivered.

Marc receives his package.

Brand Action

The retailer sends out an order confirmation and delivery estimation, giving Marc an option to schedule the delivery.

The retailer confirms the appointment and notifies Marc when his package is on its way.

Backend system

Company's Website

Customer Relationship Management

Agent Chat Interface

31

Call-to-Actions
for customer engagement

Like in the Discovery phase, where customers want to receive product information on WhatsApp, companies can apply call-toactions (CTAs) on their websites in the PostPurchase phase. CTAs are curated content to engage new and existing customers. It is a place where customers can interact with your brand and buy your product.

A CTA on the website will lead the consumer to WhatsApp. This is a great way to engage with customers who need more personalized information from a brand, such as tips, fashion advice, tutorials, and more. While it's **not permitted** to broadcast newsletters and unsolicited content on WhatsApp, it is possible to use WhatsApp for what it is: a user-centric channel, where consumers receive videos and tips without friction as shown in the example.

Cooking with Anthony - You don't have to drop major dough to make something delicious for dinner. Anthony has another great recipe today.

Get the video on WhatsApp
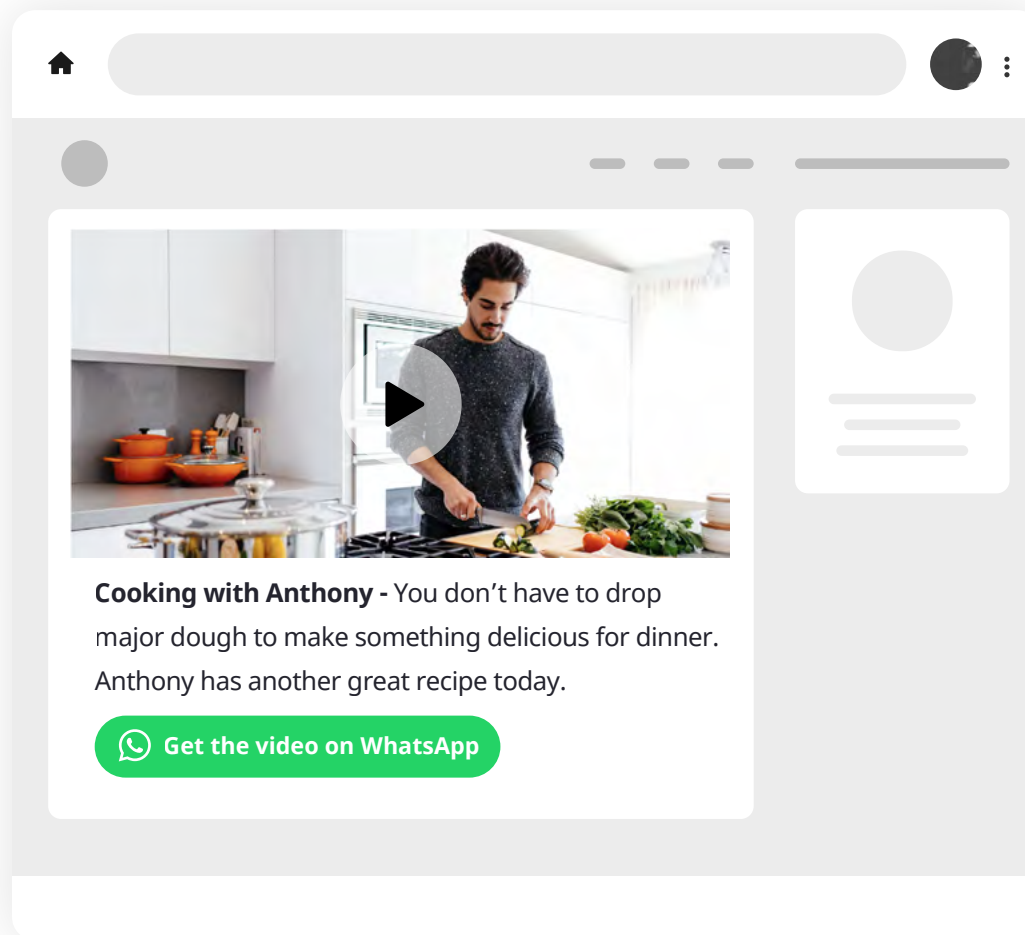
4.0 Building WhatsApp entry points

Now that we know how WhatsApp Business works and how it pays off in the customer journey, it is time for companies to start building WhatsApp entry points in different places. Companies need to develop a strategy to let customers know this new channel is available for every step in their journey.

To create awareness for the new messaging channel, we encourage companies to get creative in spreading the news that customers can use WhatsApp to converse with their business. Here is a quick overview on how companies can create awareness via paid and organic methods:
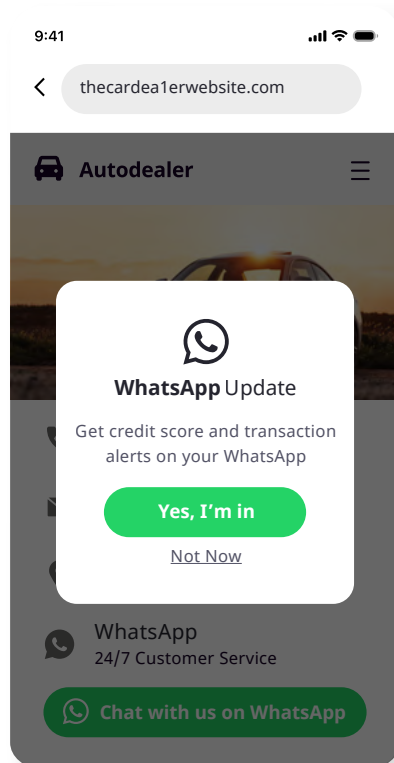
Paid awareness

- ✓ Ads that click to WhatsApp on Facebook and Instagram.
- ✓ Google Adwords campaigns

Via organic content

- ✓ Organic SERP listings for your Contact Us page
- ✓ In-app promotions on Android and IOS
- ✓ Conversation starter buttons on your website
- ✓ Company email signatures
- ✓ QR codes on product packaging and other advertising.
- ✓ Call deflection to route incoming call to WhatsApp

9:41

thecardea1erwebsite.com

🚗 Autodealer

WhatsApp Update

Get credit score and transaction alerts on your WhatsApp

Yes, I'm in

Not Now

WhatsApp
24/7 Customer Service

Chat with us on WhatsApp

4.1 WhatsApp click to chat buttons

To initiate a conversation via WhatsApp, a company should integrate conversation starter buttons on their website. By building these entry points, a website visitor can simply click a button to request more information about a product, or to get relevant content like tips, tutorials, advice etc. On the agent side, when the customer clicks "Chat with us" button, that customer's phone number is collected and a link is created that starts a chat with them. By clicking the link, the chat automatically opens.

our advise

We advise you to include your WhatsApp number on your home, customer support and/or contact pages. You might event consider creating a dedicated landing page for additional visibility.

Getting started

Fortunately, adding a Click-to-chat button is as easy as you would imagine.
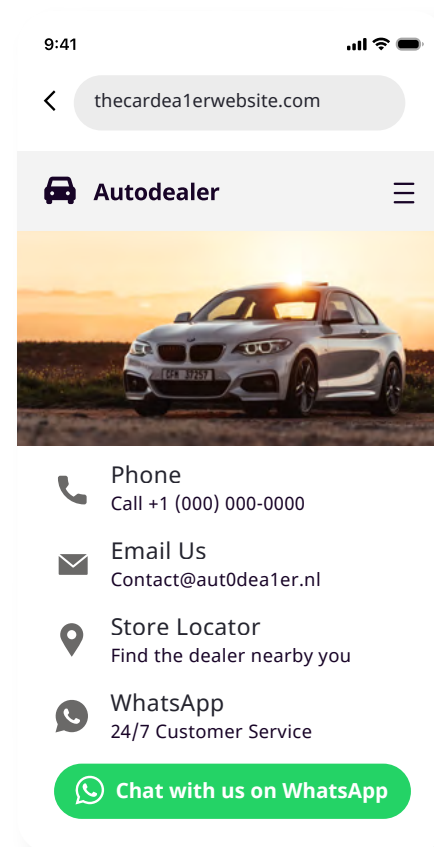This function works with wa.me links. Your company can create its own link using **https://wa.me/<number>** where **<number>** is the full phone number in international format.

After creating your own link, you are able to design the link as a button and then use it on your website. To best assess where to place these conversation starter buttons, review your monthly traffic to decide on targeted placements.
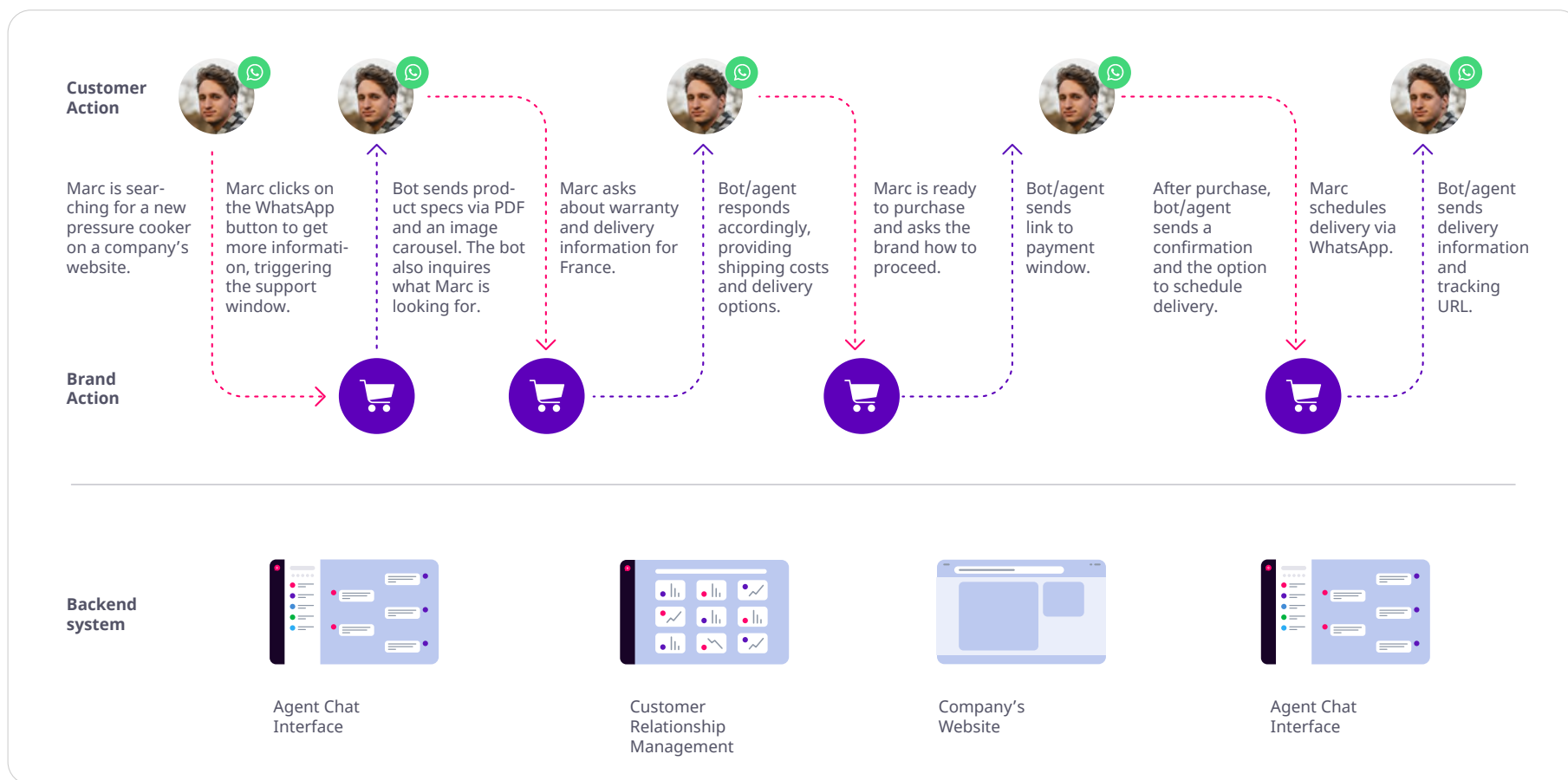
9:41

thecardea1erwebsite.com

🚗 **Autodealer**

Phone
Call +1 (000) 000-0000

Email Us
Contact@aut0dea1er.nl

Store Locator
Find the dealer nearby you

WhatsApp
24/7 Customer Service

Chat with us on WhatsApp

WhatsApp Click to Chat Button Scenario

Customer Action

Marc is searching for a new pressure cooker on a company's website.

Marc clicks on the WhatsApp button to get more information, triggering the support window.

Bot sends product specs via PDF and an image carousel. The bot also inquires what Marc is looking for.

Marc asks about warranty and delivery information for France.

Bot/agent responds accordingly, providing shipping costs and delivery options.

Marc is ready to purchase and asks the brand how to proceed.

Bot/agent sends link to payment window.

After purchase, bot/agent sends a confirmation and the option to schedule delivery.

Marc schedules delivery via WhatsApp.

Bot/agent sends delivery information and tracking URL.

Brand Action

Backend system

Agent Chat Interface

Customer Relationship Management

Company's Website

Agent Chat Interface

Above is a Click-to-Chat scenario so you can see how easy it is from both the customer and agent sides. Here you'll see how Marc goes from searching for a pressure cooker, through to the purchase and confirming a delivery date/time via WhatsApp
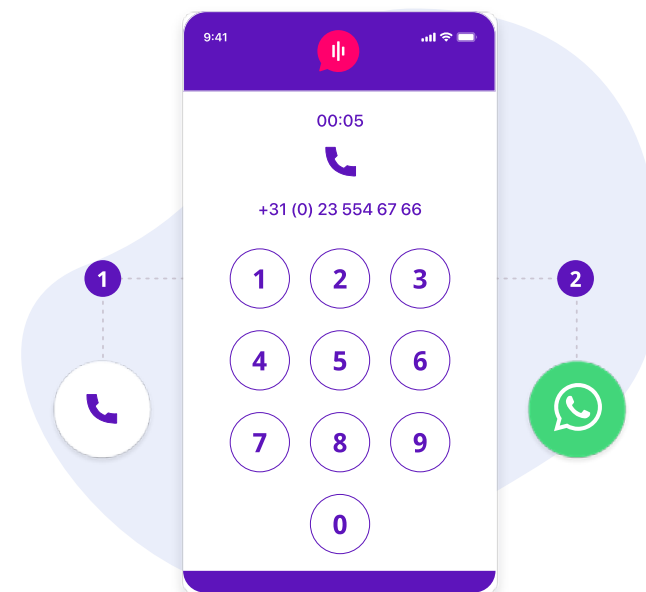
4.2 WhatsApp call deflection

Known as 'call-to-messaging deflection', more and more brands are deploying call deflection in WhatsApp Business to enhance their customer support.

This means that companies want to reduce the number of calls that come into the customer care centre and instead redirect them to alternative channels by introducing WhatsApp into their Business. As a result, there is an increase in customer satisfaction and a boost operational efficiency. Critically, it also lowers admin costs, as customers are redirected from expensive voice channels to low-cost messaging channels they already use, such as WhatsApp.

The benefit of call deflection in WhatsApp is that it:

1. provides better service, as WhatsApp enables customers to share photos, videos, and other media to illustrate customer issues.

2. improves agent efficiency by shifting customer issues to WhatsApp, where agents can handle more conversations at once.

3. reduces overall costs of customer service phone operations.

Use Case
Vodafone Germany

When Vodafone Germany implemented call deflection to solve invoice queries and other services, it resulted in:
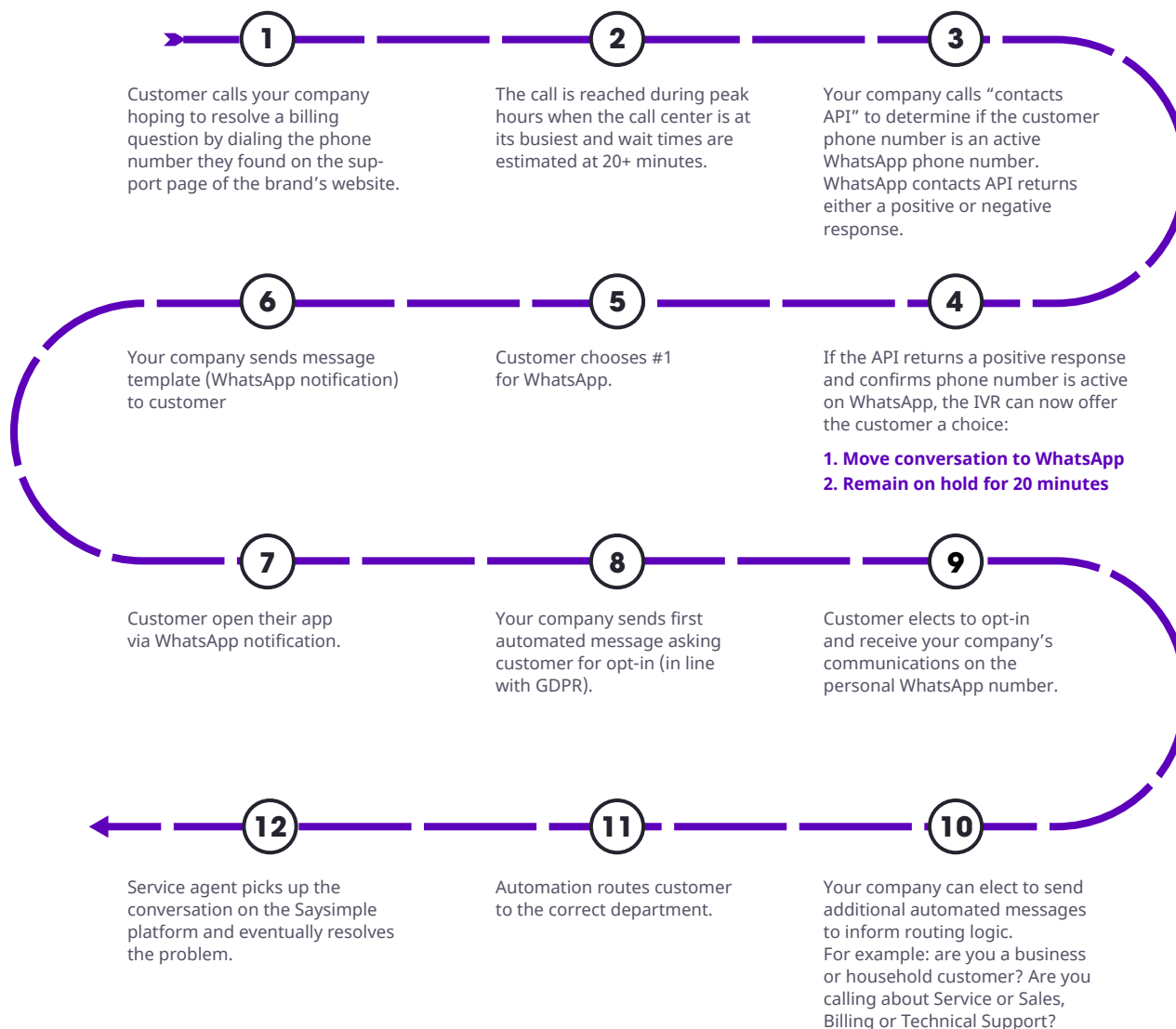
45% Higher opt-in rate for WhatsApp, compared to SMS

Of customer conversations occured via WhatsApp **62%**

350k Customers served through the WhatsApp Business API

In-depth user flow for WhatsApp call deflection

1 Customer calls your company hoping to resolve a billing question by dialing the phone number they found on the support page of the brand's website.

2 The call is reached during peak hours when the call center is at its busiest and wait times are estimated at 20+ minutes.

3 Your company calls "contacts API" to determine if the customer phone number is an active WhatsApp phone number. WhatsApp contacts API returns either a positive or negative response.

4 If the API returns a positive response and confirms phone number is active on WhatsApp, the IVR can now offer the customer a choice:

1. Move conversation to WhatsApp
2. Remain on hold for 20 minutes

5 Customer chooses #1 for WhatsApp.

6 Your company sends message template (WhatsApp notification) to customer

7 Customer open their app via WhatsApp notification.

8 Your company sends first automated message asking customer for opt-in (in line with GDPR).

9 Customer elects to opt-in and receive your company's communications on the personal WhatsApp number.

10 Your company can elect to send additional automated messages to inform routing logic.
For example: are you a business or household customer? Are you calling about Service or Sales, Billing or Technical Support?

11 Automation routes customer to the correct department.

12 Service agent picks up the conversation on the Saysimple platform and eventually resolves the problem.
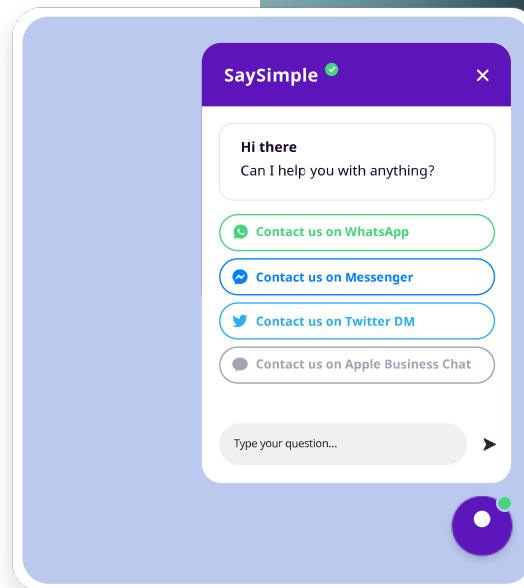
4.3 WhatsApp chat widget

The best way to add WhatsApp as a chat option on your website is by using a multichannel chat widget. With this, your customers can choos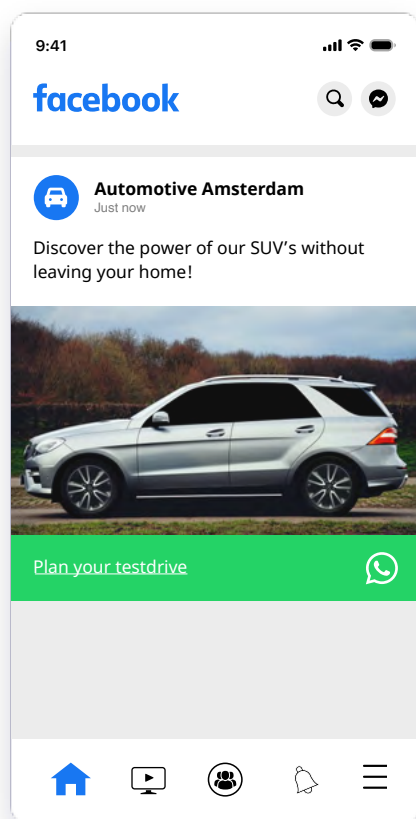e their favorite communication channel on your website. They can choose WhatsApp or another channel, such as live chat, Twitter, Facebook Messenger, or Apple Business Chat. Now your customers can always contact you quickly via their favorite channel. On your end, the messages will end up in one inbox, together with the other communication channels.

You get to keep a nice and clean overview without having to continuously switch channels.

SaySimple ✓   ✕

Hi there
Can I help you with anything?

Contact us on WhatsApp

Contact us on Messenger

Contact us on Twitter DM

Contact us on Apple Business Chat

Type your question...

4.4 WhatsApp click-to-chat Ads

Another way to build a WhatsApp entry point is by using the Click-to-Chat Ads, which are similar to the conversation starter buttons we mentioned earlier. This allows streamlined integration between Facebook advertising and WhatsApp Business. With ads that direct users to WhatsApp, you can add a Send Message button to your Facebook or Instagram ads that will open a conversation thread in, for instance, your Saysimple multichannel inbox. This way, customers are able to connect with your business on WhatsApp after clicking the button on your ad.

This combination of Facebook ads linked to a WhatsApp Business account gives marketers the ability to reach their target audience with a focused message and personalized follow-through via the largest chat app in the world. Click-to-Chat ads are an easy way to leverage Conversational Marketing first-hand, linking f rom your Facebook Ads and enabling your customer to discover your products and services with a solicited message

9:41

facebook

Automotive Amsterdam
Just now

Discover the power of our SUV's without leaving your home!

Plan your testdrive

" 9 out of 10 consumers prefer using messaging to communicate with businesses and 56 percent would rather message customer service than speak on the phone. Chat apps have become a core communications channel. And WhatsApp, the world' s largest chat app, became the leader in powering these interactions with its Business API."

5.0 Integration & Rollout

Now that you understand the strategy and specifics of WhatsApp Business, it's time to think about two major steps: integration and rollout.

As mentioned at the start of this guide, small businesses can simply download WhatsApp Business. However, for medium to large business the WhatsApp Business API needs to be integrated. Though it's possible to integrate directly with WhatsApp, their strategy has been focused on working with official partners to leverage integration and services to enterprises across the globe. This means that every business has to go through an approval and business verification process to request access to WhatsApp Business

Entry Points

Build WhatsApp channel awareness

PHONE IVR   EMAIL

WEB   CLICK TO WA ADS
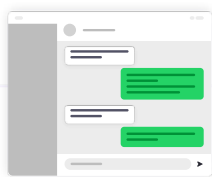
Drive Messaging Efficiency

How do you manage the business to customer conversation thread?

NLP   SMART ROUTING

LIVE AGENS VS. AUTOMATION
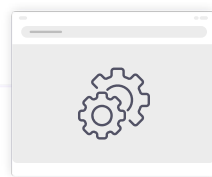
Exit Points

How do you integrate your backend sales and service systems?

KNOWLEDGE BASE

TICKETING SYSTEM   CRM

PAYMENT PROVIDER

At your service

At Saysimple, we are here to help you throughout the process of approval, onboarding, adoption, and technical installation. With our officially supported messaging API, you'll have access to a feature-rich, scalable, and GDPR compliant solution.
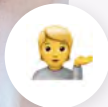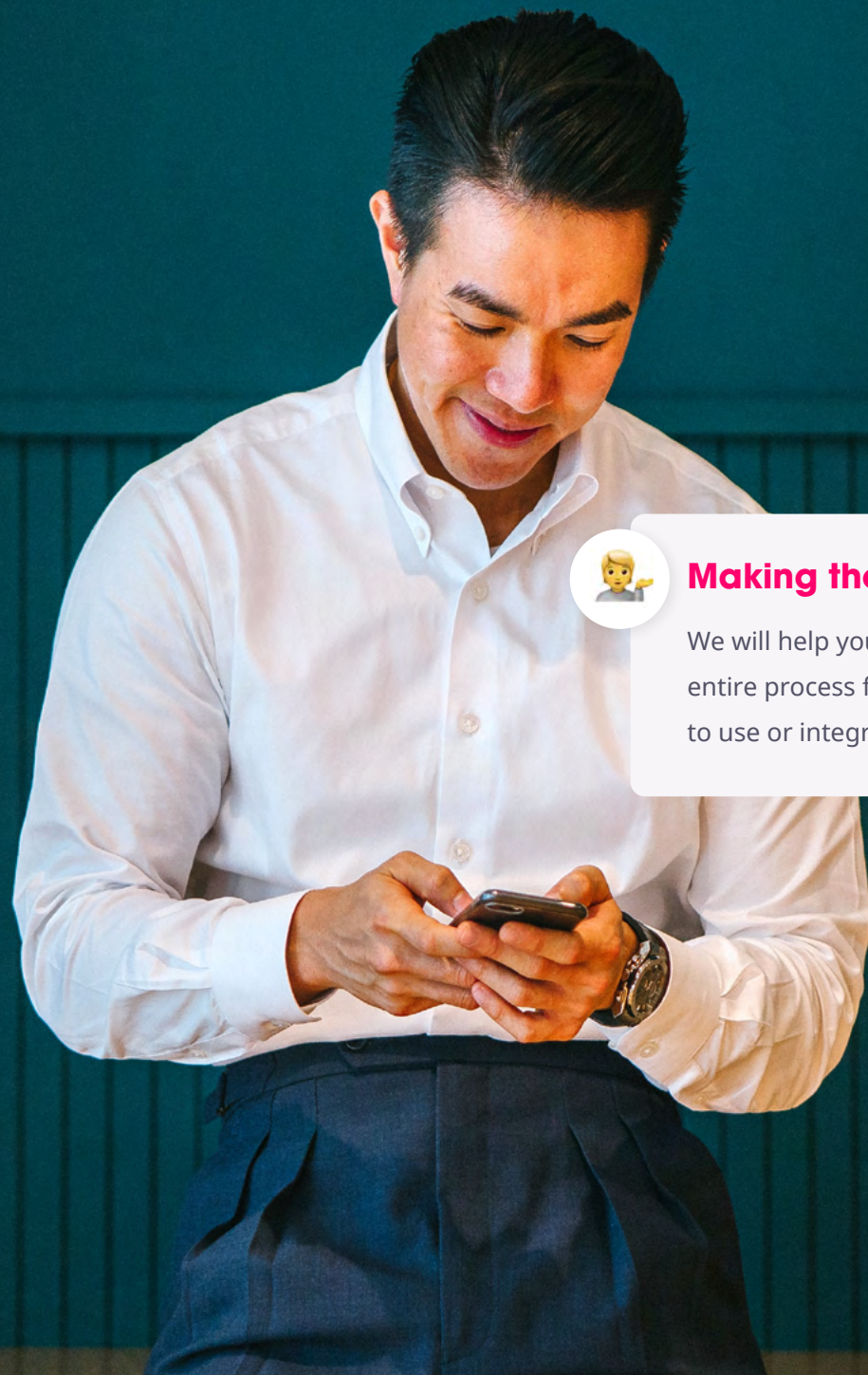
🧑‍🦱 **Making the right decision**

We will help you throughout the entire process for how you want to use or integrate with WhatsApp.

CONSIDER THIS

What we see is that many companies are still testing the waters. They look for ways to integrate appropriately without huge costs and developer investment, whilst also planning how to test and converse with customers via WhatsApp. What you need to consider is whetheryou prefer to keep the service inhouse or if you want to have a third party run it for you.

Maintaining your WhatsApp integration requires hosting, scaling, monitoring, and even troubleshooting WhatsApp software clients and third party databases in your own cloud infrastructure, and an official provider like Saysimple will take care of all of that eliminating the operational overhead of maintaining your own WhatsApp integration. in your own cloud infrastructure.

Taking this into consideration, let's look at 3 ways that you can integrate WhatsApp Business today.

3 ways to integrate WhatsApp Business

1 Download WhatsApp Business App

You may prefer to keep WhatsApp conversations separate from your core systems. This is perfect for small businesses with less developer resources and where the customer service is managed by one person. It's a way to get started with WhatsApp as a low-threshold product until your company matures enough to justify a deeper integration. If that's the case, the best choice is to download the WhatsApp Business app ready for your company to utilize, without the need to integrate with the WhatsApp API.

2 Integrate a chat collaboration tool / unified inbox

For medium sized companies there is the option to integrate WhatsApp Business into your customer management software with the provider's API. With a WhatsApp Business account you can receive messages from WhatsApp in collaboration tool without the necessity to integrate with the WhatsApp API, perfect if your client service team consists of multiple people.

3 Integrate One or Multiple Systems

If you want to access other customer data and functionalities, the WhatsApp Business API can be integrated into CRM, contact center, collaboration tools, ERP systems, and more. While the integration digs deeper into existing platforms, it allows for enhanced speed and personalization levels, as it's possible to access a user's data stored on the CRM and utilize it as the basis for the conversation. The Saysimple Multichannel Inbox is a perfect example and allows you to manage in- and outbound WhatsApp conversations at scale.

Rollout strategy

Once you have integrated WhatsApp, it's time to plan your rollout. Your customers expect your WhatsApp channel to work flawlessly, that questions will be answered without any delay and that the content shared is relevant.

While there may be a few hiccups—no rollout is ever perfect—there are a few strategies we advise you to follow to avoid mishaps.

1

Internal testing

Once you have finished the integration of the WhatsApp Business API with your internal systems and you are ready to start messaging with your customers over WhatsApp, test the channel with your team first.

2

External test group

Select a few test users to whom you want to rollout WhatsApp Business internally. This will enable you to intercept mistakes, questions and technical bugs that your team didn't predict beforehand. For example, an external user may ask completely different questions to the ones you have prepared for, prompting the creation of a new conversation flow entirely.

When rolling out to a sample of your customer base, you may consider between 1 to 5% of your users.

3

Phased rollout

While you expand your WhatsApp Business rollout to all of your users, you're still in the learning phase and need to improve constantly. Depending on your capabilities, e.g. number of staffed agents, chatbots available, etc., you may consider a phased rollout.

4

WhatsApp is up and running

WhatsApp monitor acitivity on the platform. Here are a few tips to keep it running:

- ✓ Response time: within 24 hours maximum
- ✓ Don't send spam
- ✓ Make quick replies
- ✓ Use templates
- ✓ Use smart routing so that questions end up with the right agent

6.0 WhatsApp Business policy

We kindly suggest that you make yourself familiar with them in order to avoid having your message templates getting rejected.

WhatsApp has created sensible policies for messages sent via its channel

Overall Statement WhatsApp

WhatsApp monitors activity on the platform. Once the app detects that a company has violated any of WhatsApp's guidelines or policies, they reserve the right to limit or remove your access.

WhatsApp Business Policy

Generally, this policy gives enterprises the framework for how WhatsApp operates. The main implication here regarding message templates is that "advertising, marketing or promotional messages are not permitted, unless authorized by us (WhatsApp) in writing."

Find the complete policy here:

whatsapp.com/legal/business-policy/

WhatsApp Commerce Policy

This policy lets you know that "all messages and media related to your goods or services, including any descriptions, prices, fees, taxes and/or any required legal disclosures, to constitute product listings. Product listings must comply with these policies, and applicable law and regulation."

A list of prohibited items and WhatsApp's complete commerce policy:

whatsapp.com/legal/commerce-policy/

7.0 About Saysimple

Saysimple is a Software-as-a-Service (SaaS) company, revolutionizing the way companies get and stay in touch with their customers through new and emerging channels. Our Customer Contact Management platform provides customer contact **professionals with the technology they need to manage inbound- and outbound customer conversations. We help our customers shift to effortless customer experiences on all channels and at every touch point on their customer journey.**

Your WhatsApp Business partner

With the officially supported Saysimple messaging API you'll have access to a feature rich, scalable, and GDPR compliant solution. With Saysimple, we guide you through the entire WhatsApp Business API approval, onboarding, adoption process and technical installation.

Our API can be integrated into any system you're currently running. Alternatively, we can also offer a Customer Contact Management platform, which gives you access to the WhatsApp Business Solution without developer efforts. The platform also provides possibilities to integrate other messaging channels. All in one screen.

Get in touch to find out more

Saysimple is your partner for success

We at Saysimple are looking forward to making WhatsApp Business a success for your organisation.

Join your customers on WhatsApp

Request a free demo
at www.saysimple.com

Contact Saysimple

🚀 saysimple.com

📱 +31 (0) 23 554 67 66

📞 +31 (0) 23 554 67 66

✉️ support@saysimple.com

Saysimple Netherlands

Hulswitweg 14

2031 BG

Haarlem

Nederland

Saysimple Spain

Plaze Gerardo Salvador 1

46988 Paterna

Valencia

Spanje