

A guide to getting started with WhatsApp business messaging



How does business messaging work on WhatsApp?

Meta's goal with WhatsApp Business is to help people and businesses engage in personal one-on-one communication. Users could be reaching out to get customer support, ask a pre-sales question, subscribe to a newsletter, learn more about products, or get alerts about their purchases with the business.

All of this happens in a rich media environment that lets you include text, images, buttons, documents, voice messages, videos, and even product catalogs in your chats.

With these tools, WhatsApp lets you build a presence on the app to engage customers quickly and efficiently and grow your business. To do this, WhatsApp offers two options for businesses: the **WhatsApp Business Platform** and the **WhatsApp Business App**.



Understanding the WhatsApp ecosystem

There are technically three WhatsApp versions: the private WhatsApp chat app, WhatsApp Business, and the WhatsApp Business Platform.

However, businesses are only allowed to use the **Business App** and the **Business Platform**. The Business App is free of charge, but doesn't allow you to scale or personalize your communication or include automation, and it doesn't guarantee data compliance.

For businesses with more than five employees, the WhatsApp Business Platform is generally the best option. It's great for companies that want to use WhatsApp as a new marketing or service channel or businesses looking to integrate WhatsApp into their existing products and solutions.

The WhatsApp Business Platform also comes with handy business-centric features that the free app doesn't include. Think verification badges to deter scammers and the option to connect chatbots to automate conversations to reduce the workload on staff answering repetitive questions.

Let's take a closer look at what you can do with the WhatsApp Business Platform:

	App	Business App	Business Platform
Free app	✓	✓	✗
Compliant with WhatsApp's Commerce Policy	✗	✓	✓
GDPR compliant	✗	✗	✓
Verification System (check)	✗	✓	✓
Multi-messaging inbox	✗	✗	✓
Marketing (bulk) messages	✗	✗	✓
Chatbots	✗	✗	✓
Interface (API)	✗	✗	✓
Business systems	✓	✓	✗
Product listings	✗	✓	✓
AI/ML service	✗	✓	✓
Agency access & rights	✗	✗	✓

How can businesses use WhatsApp?

Use case: marketing!

WhatsApp provides a direct way to your audience – no spam folders, no obscuring algorithms. That gives your content the users' full attention.

The users' familiarity with the app combined with WhatsApp's many multimedia options also make your campaigns more engaging.

And interacting on WhatsApp is also a lot of fun! That's why the app is perfect for inspiring your audience with your content.



Inform

- Send important updates and special offers
- Announce new product launches
- Send out regular newsletters
- Enable quick price checks



Engage

- Let users find you easier with a store locator
- Set up a poll or let users send you new product ideas
- Work with influencers to draw in a new audience



Inspire

- Play fun games to bond with users
- Offer a video tour
- Send inspirational content (recipes, gift guides, how-tos, etc.)

How can businesses use WhatsApp?

Use case: re-engagement!

Did you know that repeat customers tend to spend 300 times more than new ones? So, how do you gain repeat customers? In today's fast-paced world with many options, it's not the product that keeps customers coming back, but the experience they have with your brand.

Can they just tap one button and re-order a product? Do they find your communication engaging enough to come back? Is it easy for them to leave feedback? WhatsApp can provide all of that, and more!

You can easily set up personalized re-engagement campaigns, re-sell products with one message, and save a lot of ad money (sending someone a message is much cheaper than a re-targeting ad)! In the end, you'll have happier and more loyal customers!



Re-sell, cross-sell, and upsell faster

- Send existing customers new offers in the same chat (based on shopping history)
- Ask them to check out new products that they also might like



Personalized re-engagement campaigns

- Send special deals to existing customer
- Ask customers if they want to re-order (and add easy reply buttons)



Improve customer loyalty

- Ask customers for feedback
- Send links to review portals

What businesses can use WhatsApp?

Now that you've seen how businesses can use and benefit from WhatsApp, how can you get started?

The first thing to check is whether your business is even allowed to use WhatsApp. WhatsApp has its own terms of engagement that state which businesses can use WhatsApp and which can't. So, to help, WhatsApp lets users give feedback on the messages they receive from a business. They can report your messages and even block your phone number. Based on the frequency of feedback, WhatsApp will give your phone number a quality rating.

Allowed by WhatsApp

- Financial services
- Retail and e-commerce
- Travel and hospitality
- Telecommunications
- Entertainment
- HR and Recruiting
- Education
- Real estate
- Insurance
- Logistics
- Government organizations and NGOs (stricter approval process in place and uses are limited)
- Medical services (stricter approval process in place and uses are limited)

Restricted by WhatsApp

- Political organizations
- Gambling
- Adult content
- Dating services
- Alcohol and drugs
- Medical drugs
- Weapons
- Payday loans, paycheck advances, P2P lending, debt collection, and bail bonds
- Real, virtual, or fake currency, including ICOs and binary options

For more information about what is and isn't allowed over WhatsApp, you can look at their [business policy](#) and [commerce policy](#).

What type of messages can you send on WhatsApp Business and are opt-ins needed?

WhatsApp breaks messaging down into four categories of conversations: marketing, utility, authentication (initiated by businesses), and service conversations (initiated by users). While user-initiated service conversations don't require any special setup from businesses, business-initiated conversations have to be set up through templates.

Templates for marketing, utility, and authentication

🔑 Authentication

📣 Marketing

⚙️ Utility

Whenever your business reaches out to a customer, you have to set up a template first. WhatsApp offers three types of templates, based on the message objective and business goal: marketing, utility, and authentication.

A marketing conversation could be a new deal, an offer for an upgrade to existing customers, or a message about a new product. A utility message could be an order confirmation or an important message about an account update. Authentication conversations are templates for sending codes, such as one-time passwords.

Opt-ins are required to start these three types of conversations and they must use templated messages that have gone through a WhatsApp approval process first.

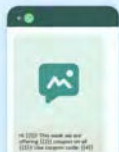
Template requirements

Templates have to fulfil specific guidelines and every new template has to be approved by WhatsApp first, but this process typically only takes a few minutes.

Once WhatsApp has approved a template, you can re-use it as many times as you want. Unless you make major changes, it won't need to be submitted for approval again.

And re-using your templates makes sense since they make it easier for you to scale your communication because templates can contain placeholders for personal information, such as the name of the customer, their order number, or more information that is pulled from your internal systems. Even images can be customized. In other words, sending highly personalized messages to a large number of users on WhatsApp is incredibly easy.

Verified WhatsApp Business accounts can have up to 8,000 templates. That's a lot of templates!



Are opt-ins needed?

In short, yes. Unless a user contacts you first, your business must get an opt-in to be able to initiate the conversation.

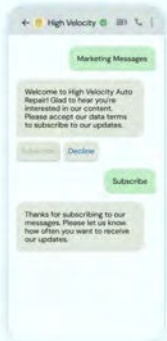
So, how can you collect opt-ins? You can embed WhatsApp opt-ins into many of the same places you get your opt-ins for email and SMS communication. WhatsApp states that the following locations are allowed for opt-in collection:

- Through SMS redirect: Request opt-in via SMS redirect
- In the WhatsApp chat: Either manually through an agent or automated with a bot
- By phone: Create an interactive voice response (IVR) flow
- With a website widget: Gather opt-ins on your website, landing pages, or social media profiles

WhatsApp requires three things from a business when getting an opt-in:

- Businesses must clearly state that a person is opting in to receive messages from the business over WhatsApp
- Businesses must clearly state the business' name that a person is opting in to receive messages from
- Businesses must comply with applicable data protection laws like GDPR

If you meet the three criteria above and use any of the approved methods by WhatsApp, you're good to go.



How does WhatsApp rate message template quality?

WhatsApp wants to ensure that all messages received by end users are expected, useful, and of high quality. And as a business, you don't want your customers to feel like you're spamming them either.

So, to help, WhatsApp lets users give feedback on the messages they receive from a business. They can report your messages and even block your phone number. Based on the frequency of feedback, WhatsApp will give your phone number a quality rating.

High Quality

Medium Quality

Low Quality

If you do unfortunately find yourself rated as low quality, here are some useful tips you can use to improve your quality rating!

- 🕒 See if a new template has been added and used in the last seven days. If yes, then that template could be the cause of the drop in quality, so it needs to be looked at again.
- 🕒 Take a look at your messaging frequency. Are you sending too many messages in a short time? Or maybe at anti-social hours?
- 🕒 Get the required consent to start messaging users! If you start sending messages to users that aren't expecting them or don't want them, they might block you which can lead to poor quality.
- 🕒 Ensure you're messaging users about what they opted-in for. If you said you would only send receipts over WhatsApp but are now using it to send discount offers or account updates, your customers may respond negatively.
- 🕒 Make sure that you have included opt-out instructions in your message so those users who no longer want to receive your messages can opt-out easily.
- 🕒 Check that your outbound messages comply with [WhatsApp's policies](#).

How can I promote my WhatsApp business contact?

WhatsApp doesn't allow in-app ads and in most markets, users can't search for businesses directly on WhatsApp. This means that you have to guide users from other platforms into your WhatsApp chat. Here are a few ideas on how to promote your WhatsApp channel.

- 🟡 You can set up messaging widgets on your website.
- 🟡 You can also use click-to-chat links on any digital platform (websites, email signature, Google ads, etc.) that lead straight into your WhatsApp channel.
- 🟡 Also think about click-to-chat ads on Instagram and Facebook that are prominently displayed and guide users directly into your chat.
- 🟡 There's also the possibility to use QR codes that lead users right into the chat, from an online or offline platform.

