ROGER365.io

Make WhatsApp Part of Your Centralized Business Communication

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ROGER365.io

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Introduction

Your customers prefer to use a communication platform that is fast, easy, and accessible.

WhatsApp is one of the communication channels that checks all of these boxes and is becoming an important messaging platform for many businesses. With over two-billion users worldwide, you can reach a large part of your audience by adding WhatsApp to your communication strategy.

But how do you activate this communication channel and improve customer engagement while limiting compliance and operational risks?

These are the questions that many businesses are struggling with. Businesses recognize the potential of connecting with WhatsApp but are concerned about the many requirements the solution must have to avoid IT infrastructure complexity and having extra client applications to maintain.

The solution must be easy for customers while tightly integrating into your business processes, providing insights into how your organization is performing and, optimally, interfacing with existing customer data sources.

This whitepaper breaks down these requirements and offers a solution for all of them so that your business can make full use of WhatsApp communications while eliminating any potential risks.

General requirements

First, let's look at the most important applications and services in your organization.

Standardize on Microsoft Teams

The first step is to embrace the Microsoft Teams platform. When you have Microsoft Teams in your organization, ideally this must be the only communication client that your staff has to use. By standardizing on Teams, you maintain a central security structure and simplify the roll-out of Teams-based solutions, avoiding silo IT, shadow IT, and unnecessary compliance challenges.

Integrate WhatsApp into Microsoft Teams

Choose a solution that seamlessly integrates WhatsApp into Microsoft Teams. This makes it immediately available to all of your users and will accelerate the adoption of WhatsApp as a business communication channel. By using a single client in your organization (Teams), you will also minimize the risk that your staff will use personal apps/solutions to communicate with your customers.

Standardization also provides for a positive customer experience and a unified face for your organization.

Keep in mind that WhatsApp can only be integrated via WhatsApp for Business provided through an authorized Business Solution Provider (BSP).

Keep a single customer source

Use a Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), or Service Level Management (SLM) platform as a source and allow automatic or manual updates without leaving the Teams client. Integrating the Teams client with these platforms allows you to keep all of your customer data centralized and provides for a 360-degree customer view. When this data is readily available during each customer contact, it ensures that you always have an understanding of your customer's journey, thus improving customer satisfaction.

Get insights

Ensure that all business communication is going over the same platform. This will allow you to create reports and gain insight into all of your business communication. These insights are not only based on statistics but also allow you to understand the content of the communication. By doing this, you can make data-driven decisions to maximize the effectiveness of every department.

Integrate and accelerate workflows

Where possible, automate repeatable and predictable business processes. They are ideal to automate and accelerate business workflows, improving the overall efficiency of your organization.

By using the "no-code/low-code" method, you can integrate automation into your business workflows to save time and make it easier for customers to do business with you.

ROGER365.io is the solution

Now that these major components have been defined, you've probably noticed that many of them are already available within your organization. Now it's just a matter of connecting them together. This is where the ROGER365.io platform comes in.

The ROGER365.io platform integrates WhatsApp into Microsoft Teams. This means all WhatsApp communication is handled via one platform (Microsoft Teams), and that messages can be uniformly handled by multiple people.

Many organizations, from SMB to global enterprises, have already chosen ROGER365.io for just this purpose. With ROGER365.io, you can seamlessly integrate WhatsApp communication into Microsoft Teams. Making Teams the central communication hub within your organization will improve customer engagement, accelerate your workflows, and optimize your business processes.

ROGER365.io has a very flexible workflow engine that can be used to cover all your communication use cases, from simple to complex, with one or multiple touchpoints. The only client needed is Microsoft Teams.

Beyond centralize communication, ROGER365.io offers seamless integration with CRM/ERP/SLM systems with extensive reporting options and open APIs to maximize customization for every scenario.

Approach it step-by-step

Starting a new project can be overwhelming. The bigger the project, the bigger chance it can fail. With ROGER365.io, this is not the case.

Once you have defined your use case, whether simple or complex, it's likely that you have not identified every way that this integration can benefit your organization. The flexibility of the ROGER365.io platform allows for customization as your requirements change, resulting in a future-proof solution that grows with you.

With the workflow engine and configuration options, you can start with a straightforward scenario and then continue to enhance the solution by adding features such as reporting and automation. The ROGER365.io subscription model also helps, without requiring a high upfront investment.

We recommend the following sequence for your project. This sequence is not mandatory, but we've found that many ROGER365.io customers benefit from splitting the deployment steps in this way.

1. WhatsApp into Teams, see scenario: *The basics: Enable WhatsApp for Teams*
2. CRM/ERP integration (optional)
3. Get the insights (optional but recommended)
4. Roll out company wide, see scenario: *Companywide deployment*
5. Add more touch points
6. Optimize business process, see scenario
7. Make it part of campaigns or informing multiple customers at the same time

Roll-out WhatsApp into your business
The basics: Enable WhatsApp for Teams
The first step many organizations take is to start with the basic deployment scenario. The requirements are simple. You need to have a WhatsApp for Business profile via a WhatsApp BSP, ROGER365.io subscription, and Microsoft Teams.

Connect the WhatsApp for Business profile via the API to ROGER365.io and connect ROGER365.io to a Teams channel. Configure the permissions within Teams and give access to a group of people that will monitor the channel and answer any questions received via WhatsApp.


WhatsApp For Business

Channel 1

With a little preparation, this scenario can be rolled out within hours. This allows your users to get familiar with the solution and you will have immediate results.

Interesting features to mention are the Wallboard to get a complete overview of all active conversations and the "assign" feature. "Assign" allows your users to assign a WhatsApp conversation to themselves or a specific person. The user receives an alert in Teams that he/she is now the owner of the conversation.

CRM, ERP and SLM integration

Add CRM/ERP/SLM integration to get a 360-degree customer view and, when needed, display additional customer information such as open tickets, opportunities, or any other information specific to your business. This feature requires a central CRM/ERP system, or at least a database, with customer information including mobile phone numbers. The mobile number is used to recognize the customer and display their relevant information via a Teams adaptive card in the Teams channel.
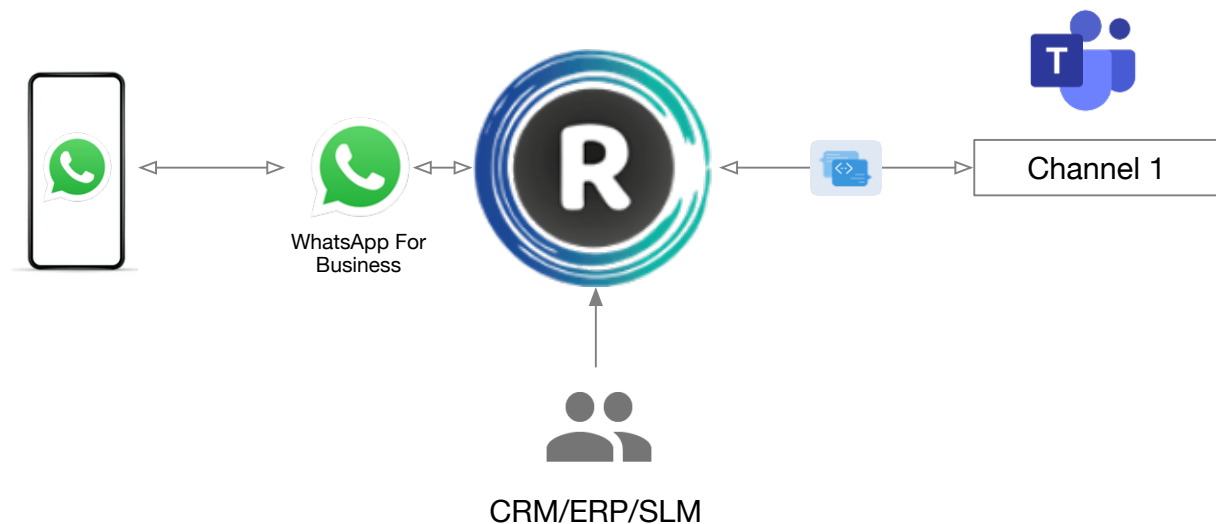
CRM/ERP/SLM

ROGER365.io supports the following CRM/ERP/SLM systems out-of-the-box; Dynamics, SalesForce, TOPdesk, and Exact Online. For other systems, like ZOHO, you can use our generic CRM API.

Get insights

The more communication that you have, the more important it is to have an understanding on what/who/where about that communication. ROGER365.io comes with standard reports that provide statistical information about your business communication, but you can take this a step further by exporting this data into a dedicated reporting system such as Power BI.

This gives you the opportunity to see exactly what is communicated and make "data driven" decisions, including the ability to be proactive with problems or trends.

ROGER365.io also has a feature called "sentiment analytics". This feature analyzes the content and tone of the conversation to provide information about the sentiment. If a conversation changes from "happy" to "sad", you can trigger a process and research why this happens and correct when necessary. Of course, it can also go the other way, such as if a conversation starts "unhappy" and during

the conversation the sentiment changes to "happy". This analysis can provide valuable information for your customer satisfaction reports.

Companywide deployment

When you have multiple locations or when your business is spread over multiple regions, you can choose to enable the WhatsApp to Teams service for all of these offices. You can choose to use one central WhatsApp profile for the entire organization or a unique profile per location. Both scenarios are explained below, but please note that there are many other options too. Feel free to contact us to discuss your requirements and ideas.

One number to many Teams channels

In this scenario, there is one WhatsApp profile. All customers contact your business via the same number. By using a routing application, ROGER365.io can forward the WhatsApp communication to the appropriate Teams channel.

You may choose this configuration for different geographic locations, specialized customer requirements, or to route to specific departments. Basically, the routing workflow chooses the Teams channel destination based on customer information stored in the CRM/ERP/SLM, or user choice presented by ROGER365.io (press 1 for Sales, 2 for support, etc.). In any case, the decision where the message is sent is based on the routing engine.

WhatsApp For Business

Routing Workflow

Channel 1

Channel 2

Channel Default

Always ensure that you have a default Teams channel that can be used when the routing engine cannot automatically determine the appropriate channel, such as when the incoming phone number is not in the CRM system.

Every customer case is different. That's why configuring or developing the routing workflow is done by a ROGER365.io partner, ROGER365.io, or the customer itself.

Multiple numbers to many Teams channels

It is also possible to have multiple WhatsApp profiles and connect each of them to a specific Teams channel. This can be a good option when you have local offices or specific departments using their own WhatsApp numbers and there is no need to centralize them.
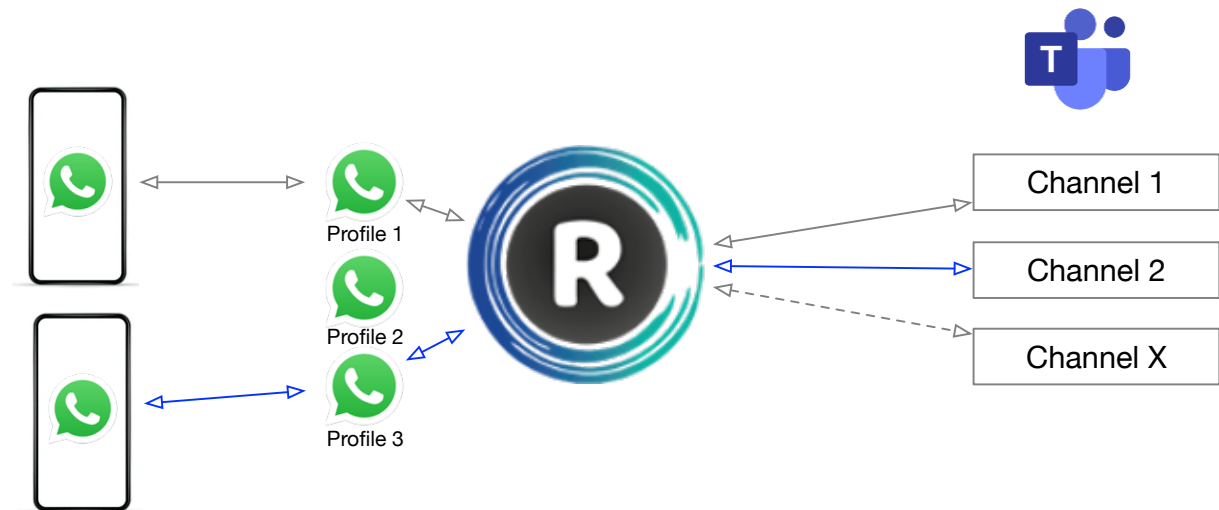
In this scenario, you do not have to configure a routing workflow, which can make the deployment a bit faster. On the other hand, it requires more WhatsApp profiles and more flows to configure and manage within ROGER365.io.

Comparison

The scenario that you choose is completely up to you. ROGER365.io supports both configurations. In the table below, there is a short comparison between the two scenarios:

One number to many Teams channels	Multiple numbers to many Teams channels
One WhatsApp profile required	Every location needs its own WhatsApp profile
Easier communication with customers when they only need one number	More "local" approach, you can use the local office number as WhatsApp profiles
Needs a central system/database to map customer number with location for routing (routing workflow)	Does not need a central system or database
Easier to manage	More admin work required
Requires more advanced configuration	Is simpler but more WhatsApp profiles can be more costly

Adding more touchpoints

To fully become an omni-channel enterprise, ROGER365.io offers support for other communication channels. Currently supported "touchpoints" that can be seamlessly integrated include webchat, SMS (text-based messaging), Facebook Messenger, and Twitter. Offering additional touchpoints can greatly improve customer satisfaction by allowing them to choose their preferred platform, while centralizing all of those touchpoints within Microsoft Teams. The ROGER365.io flow ensures that communication from these channels are handled efficiently, effectively, and in the way that best suits your organization.

Keep in mind that, due to different characteristics of each touchpoint, it may be optimal to configure a dedicated Teams channel per touchpoint.

Automate repetitive tasks

ROGER365.io offers many options to automate repetitive tasks. In general, the way to increase efficiency within your organization is to integrate the WhatsApp communication into a business process. To do this, you can use the ROGER365.io workflow engine in combination with APIs. The APIs are designed to integrate with any no-code/low-code platform like Microsoft Power Automate and Logic Apps.

You can also add Q&A chatbot technology into your communication flow. The chatbot can answer most frequently asked questions and, when required, transfer the conversation to a staff member that is monitoring the Teams channel.

You may also provide your customer with routing options such as "Choose 1 for sales, 2 for support", etc. This is a good choice when CRM/ERP/SLM integration is not available.

Another way is to have integration with services like Microsoft Booking (or other tools) to enable your customer to schedule a meeting. Add Microsoft Forms in your WhatsApp communication to ask your customer for more information or sign-up. This can also be used to trigger other processes outside of ROGER365.io.

You can manually or automatically create tickets/opportunities in the CRM/ERP system without leaving the Teams client. You can also choose to update the customer timeline automatically when a conversation is closed.

Many other scenarios are possible. Let us know your use case and we can assist you in designing the best integration for your business needs.

Send one message to many customers
There are cases where you may want to inform many customers at the same time. Think about a marketing campaign, informing customers about a scheduled maintenance window, or sending an alert to a group of people.

Using the ROGER365.io campaign API, you can connect any application with ROGER365.io and push one message to many people simultaneously. Keep in mind that you will need to handle their responses too. You can use a chatbot or enhanced flows to ensure you are not overloaded with work.

Conclusion
WhatsApp is a popular and powerful messaging platform that can be leveraged to enhance your business. Although there are many integration options, it's best to start simple and add support for more use cases as you identify them.

Avoid silo IT, shadow IT, and other challenges by streamlining your communication into Microsoft Teams and use the flexibility of workflow engines, APIs and reporting options to really benefit from this customer-centric way of communication.

Choose a solution that is designed to provide seamless and future-proof integration. The solution should fully support multiple scenarios and easily connect to your existing CRM/ERP/SLM and business processes.

ROGER365.io offers this solution and enables your enterprise to standardize on Microsoft Teams while providing all of the tools that you need to improve customer satisfaction, optimize business processes, and limit compliance and operational risks.

When necessary ROGER365.io or partners can help with defining use cases, the architecture design, business process integration, assist with creating the routing workflow, or help you with any other related question you have.

Contact us

You can always send an email to info@roger365.com or check out our website: www.roger365.io/contact-us

Send a WhatsApp message to: +31 88 365 1000 to start the conversation right away!

More information

YouTube: https://www.youtube.com/channel/UCS04VFtYiGF_n4_2x17t0qw

Website: https://www.roger365.io or https://www.roger365.io/social-messaging/whatsapp-for-business

Documentation: https://doc.roger365.io