



ROGER365.io

How to use WhatsApp to increase customer satisfaction and optimize your business processes

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Introduction

WhatsApp has become an important communication channel for many businesses. To avoid inefficiencies, security issues, and other challenges, the need to streamline WhatsApp communication into Microsoft Teams and business workflows is increasing by the day.

Many organizations have turned to ROGER365.io for the solution. With ROGER365.io, you can seamlessly integrate WhatsApp communication into Microsoft Teams, allowing it to become the central communication hub within your organization. Centralized communication improves customer engagement, accelerates workflows, and optimizes business processes.

This document provides customer examples of how you can leverage WhatsApp within your organization. Of course, each integration is customizable to meet your needs. Feel free to share your ideas with us via our website:

<https://www.roger365.io/contact-us>

WhatsApp for Business

It is important to understand that using WhatsApp for Business within Teams is not the same as using it from your own personal device or the free WhatsApp for Business version.

To make WhatsApp part of your business infrastructure, you need to work with WhatsApp Business Solution Providers (BSP). The experience for your customers is unchanged, but organizations must follow strict guidelines for security and compliance to avoid spamming customers. This is accomplished through the use of WhatsApp templates.

This document is not an explanation about WhatsApp templates, but keep in mind that templates are best used in the following situations:

- When a WhatsApp customer window is closed
- When there is no active conversation, and the business wants to initiate a conversation with the customer
- When you want to send rich media like videos, setting up meetings, or you want your customers to perform other (predefined) actions
- Inform many customers at the same time when there is news about your product, making WhatsApp part of your marketing campaign

The good thing about these templates is that they can include buttons, links, and rich media. Using WhatsApp templates helps your organization provide a better customer experience and accelerate your workflows.

Scenarios

Generic: Continue customer conversation

When there is no active WhatsApp communication for 24 hours, WhatsApp closes the “customer window”. Your customer can continue the conversation at any time, but your organization can only do this by sending a WhatsApp template. This template should be “attractive” enough for the customer to respond. Our advice is to use “buttons” and use “parameters” to make the message as specific as possible.

Send WhatsApp template from Teams

1. Go to Teams channel > choose the conversation and click [Notify]
2. Choose the right template and language and click [Send]
3. Fill in the missing information and click [OK]

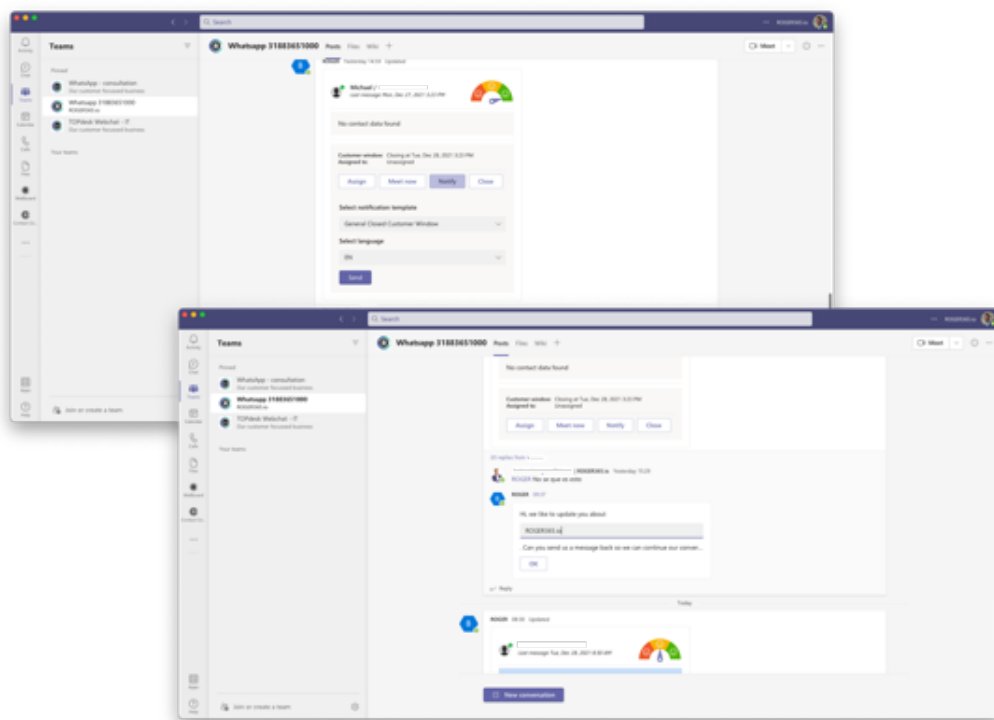


Figure 1: Sending WhatsApp template from Teams

Your customer will receive this message on their mobile phone:

When your customer clicks the button “Yes, here I am again”, the customer window will be reactivated, and you can continue your WhatsApp conversation from Microsoft Teams.

Insurance company: Send form to fill in car damage and start a process

An easy way to collect more information from your customers or to trigger another process is to add Microsoft Forms into a WhatsApp template. When sending the template, it includes a link to a Microsoft Form that can start any other defined process.

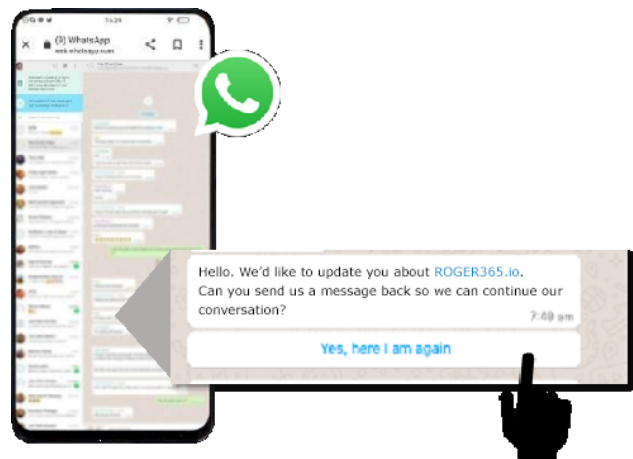


Figure 2: Reopen customer windows from customer perspective

The customer receiving this WhatsApp template can click a button. When doing this, the customer is routed to a Microsoft Form that can be filled in. By submitting the form, another defined process is triggered to finish the submission and take care of the required next steps.

For example, give your customer the ability to fill in a damage report or register new customers via this form.

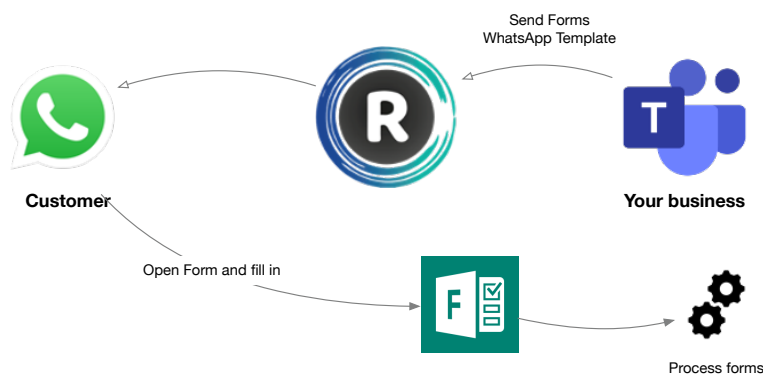


Figure 3: Let customer fill a form to trigger another process

To do this, follow the steps described in the above scenario (see: *Send WhatsApp template from Teams*) but now choose another template that has the Microsoft Forms included. The message received at the customer side will look like this:

Make it easy to plan a meeting: Sending WhatsApp template with Microsoft Booking link

Scheduling a meeting can be challenging. Microsoft has a Booking App that can help you with this. By adding the Booking App into a WhatsApp template, you can give the customer the ability to schedule the meeting directly from their phone.



Figure 4: WhatsApp template with Microsoft Forms

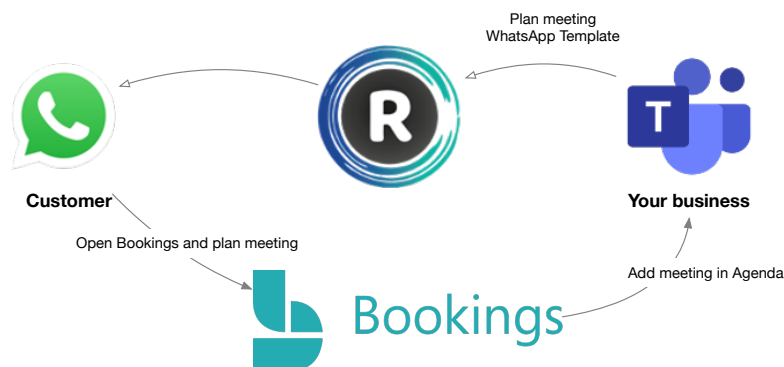


Figure 5: Flow to plan a meeting via Microsoft Bookings

To do this, follow the steps described in the above scenario (see: *Send WhatsApp template from Teams*) but now choose another template that has the Microsoft Bookings link included. The message received at the customer side will look like this:

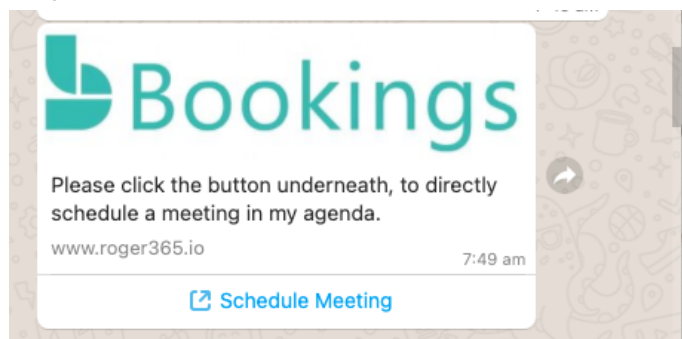


Figure 6: WhatsApp template with Bookings link

This example is using Microsoft Bookings, but it is also possible to use other functionalities to setup a meeting right away using interactive buttons.

Communicate with clarity: Send rich media messages

“A picture is worth a thousand words”, and this is even more relevant when sending videos or other rich media. Include an instructional video in your WhatsApp template and send it to your customer.

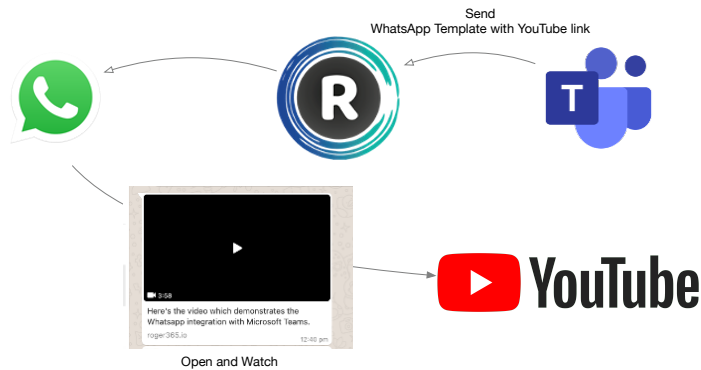


Figure 7: Sending rich-media via WhatsApp

Inform many customers at the same time

You can also send one template with a button, form, booking, or rich media, to many customers at the same time. Think about marketing campaigns, or when you work in the staffing and recruitment market, to inform people that you have a job offering for them. By adding form technology, you can let them accept this offer easily and decrease your “time to fill”.

Also consider informing your customers when there is an issue with their systems or pro-actively inform them about a scheduled maintenance window.

Others

Another benefit of ROGER365.io is that, by centralizing all your communication, you can better understand the customer journey and monitor your own performance to become a 'customer centric' organization, increasing customer satisfaction and loyalty.

Reporting provides customer and operational insights to recommend the next best actions across all functional groups. This allows you to improve your communication strategies and help your business move forward.

If that is not enough, you are also able to extract reporting data from the system to build your own reporting in (for example) Microsoft Power BI. Integrate ROGER365.io with Microsoft Power BI for interactive visualizations and more business intelligence capabilities with an interface simple enough for end users to create their own reports and dashboards. See: <https://www.roger365.io/features/insights>

Conclusion

Using WhatsApp as part of your business communication can really enrich the customer experience while helping you to optimize your business processes. WhatsApp templates can help you streamline your customer interactions, enhance how customers can reach out to you, and make WhatsApp an integral part of your business processes.

Using central reporting gives your organization the opportunity to get the insights you need to improve the customer experience even more and optimize your business processes.

Check out our YouTube channel for more inspiration. For more information about ROGER365.io, visit our website: <https://www.roger365.io>