

# WhatsApp Sales Channel Solution

## Client Presentation

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### What We're Building

A **WhatsApp-powered sales channel** that guides your customers from first contact to post-purchase engagement, all through automated messaging flows.

### The Goal

Transform WhatsApp from a simple communication tool into a **conversion-driving sales channel** that:

- Recovers abandoned carts
  - Recommends relevant products
  - Sends timely order updates
  - Requests reviews and suggests complementary items
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## How It Works - The Customer Journey

### 1. First Contact & Qualification

Customer → WhatsApp → Your Business

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"Hi [Name]! Shopping for:

- Gifts
- Home Decor
- Self-Care"

### 2. Product Recommendations

Based on customer interest:

- 2-3 curated products with images
- Brief benefits for each item
- "View Products" button → Your store

### 3. Cart Abandonment Recovery

If customer adds to cart but doesn't checkout:

45 minutes later → "Forgot something?"

Complete your purchase now: [Link]"

24 hours later → "Last chance! Your cart is about to expire"

### 4. Order Management

Order Confirmation:

"Thanks [Name]! Order #[ID] confirmed.

Estimated delivery: 3-5 business days."

Shipping Updates:

"Your order is on the way!"

### 5. Post-Purchase Engagement

2-3 days after delivery:

"Love your [Product Name]?"

Leave us a review!"

"Pair it with our [Complementary Product]  
for just \$[Price]!"

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## Technical Implementation Plan

### Phase 1: Foundation (Week 1)

- Set up WhatsApp Business API
- Create message templates
- Build core application architecture

## Phase 2: Customer Journey (Week 2)

- Implement all 5 customer touchpoints
- Connect to your product catalog
- Test automated flows

## Phase 3: Integration (Week 3)

- Connect to your e-commerce platform
- Test real webhook events
- Fine-tune timing and messaging

## Phase 4: Launch (Week 4)

- Go live with the solution
  - Monitor performance
  - Optimize based on results
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# What You'll Need to Provide

## Technical Access

- ☐ WhatsApp Business account
- ☐ E-commerce platform access (Shopify, WooCommerce, etc.)
- ☐ Product information (names, prices, descriptions)

## Business Information

- ☐ Brand name and preferred messaging tone
  - ☐ Timing preferences (when to send reminders)
  - ☐ Entry points (WhatsApp button, QR code, ads)
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# Expected Results

## Conversion Improvements

- **15% increase** in cart recovery

- **10% boost** in overall conversions
- **25% higher** customer engagement

## Operational Benefits

- Automated customer follow-up
- Reduced manual effort
- Scalable communication system

## Customer Experience

- Personalized product recommendations
  - Timely reminders and updates
  - Seamless shopping experience
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# Investment & Timeline

## Timeline: 4 Weeks

- Week 1: Foundation setup
- Week 2: Customer journey implementation
- Week 3: Integration and testing
- Week 4: Deployment and optimization

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## Next Steps

1. **Review and Approve** this proposal
  2. **Complete the Information Checklist** (separate document)
  3. **Schedule Project Kickoff** meeting
  4. **Begin WhatsApp Account Setup**
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# Questions & Discussion

Let's discuss how this solution can work specifically for your resort-themed product line and business goals.

# WhatsApp Sales Channel Project Planning & Flow Summary

This document provides a comprehensive overview of the WhatsApp Sales Channel project planning and system flows for client review and approval.

## Executive Summary

The WhatsApp Sales Channel project transforms WhatsApp into a powerful sales channel for resort-themed physical products through automated messaging flows. The solution guides customers from initial contact through post-purchase engagement, with the goal of increasing conversions and enhancing customer experience.

## Project Planning Overview

### Objectives

1. Increase conversion rates through WhatsApp-based customer engagement
2. Automate customer journey from first contact to post-purchase follow-up
3. Recover abandoned carts through timely reminders
4. Enhance customer experience with personalized product recommendations

### Timeline

- **Phase 1: Foundation** (Week 1) - Setup and core architecture
- **Phase 2: Customer Journey Implementation** (Week 2) - All 5 customer journey stages
- **Phase 3: Integration & Testing** (Week 3) - E-commerce integration and testing
- **Phase 4: Deployment** (Week 4) - Production deployment and documentation

### Budget Estimate

- Development: 4 weeks of development time
- WhatsApp API costs: Variable based on message volume
- Server hosting: Monthly recurring cost

## System Architecture Flow

```
graph TB
    A[Customer] --> B[WhatsApp]
    B --> C[WhatsApp Business API]
    C --> D[WhatsApp Sales Channel Application]
    D --> E[Configuration Files]
    D --> F[Product Catalog]
    D --> G[Message Templates]
    H[E-commerce Platform] --> I[Webhooks]
    I --> D
    D --> J[WhatsApp API Responses]
    J --> B
    B --> A
```

The system integrates with the client's existing e-commerce platform through webhooks, processes customer interactions through the WhatsApp Sales Channel application, and sends automated messages back to customers via the WhatsApp Business API.

## Customer Journey Flow

```
graph TD
    A[Customer] --> B[First Contact]
    B --> C>Welcome Message]
    C --> D[Qualification Questions]
    D --> E[Customer Interest]
    E --> F[Gifts]
    E --> G[Home Decor]
    E --> H[Self-Care]
    F --> I[Product Suggestions]
    G --> I
    H --> I
    I --> J[View Products CTA]
    J --> K[Online Store]
    K --> L[Customer Action]
    L --> M[Complete Purchase]
    L --> N[Abandon Cart]
    N --> O[Cart Started Webhook]
    O --> P[Cart Tracking]
    P --> Q[Cart Inactivity]
    Q --> R[45 min Reminder #1]
    Q --> S[24 hr Reminder #2]
    R --> T[Re-engagement]
    S --> T
    T --> K
    M --> U[Order Confirmation]
    U --> V[Order Placed Webhook]
    V --> W[Shipping Updates]
    W --> X[Order Delivered Webhook]
    X --> Y[Post-Purchase Review]
    Y --> Z[Upsell Offer]
```

The customer journey consists of five stages:

1. **First Contact & Qualification** - Welcome message and intent qualification
2. **Product Suggestions** - Curated recommendations based on interest
3. **Cart Abandonment Recovery** - Automated reminders for incomplete purchases
4. **Order Management** - Confirmation and shipping updates
5. **Post-Purchase Engagement** - Reviews and upsell opportunities

## Webhook Processing Flow

```
graph TD
    A[E-commerce Platform] --> B[Webhook Event]
    B --> C[Webhook Receiver]
    C --> D[Event Type]
    D --> E[Cart Started]
    D --> F[Cart Abandoned]
    D --> G[Order Placed]
    D --> H[Order Delivered]
    E --> I[CartHandler.processCartStarted]
    F --> J[CartHandler.processCartAbandoned]
    G --> K[OrderHandler.processOrderPlaced]
    H --> L[OrderHandler.processOrderDelivered]
    I --> M[Set Reminder Timer]
    J --> N[Log Cart Activity]
    K --> O[Send Reminder #1]
    K --> P[Set Reminder #2 Timer]
    L --> Q[Send Order Confirmation]
    L --> R[Set Review Timer]
    M --> S[Database]
    N --> S
    O --> T[WhatsApp API]
    P --> T
    Q --> T
    R --> T
    T --> U[Customer WhatsApp]
    S --> X[Data Store]
    U --> X
    V[X] --> X
```

The system processes four types of webhook events from the e-commerce platform:

1. `cart_started` - Triggers cart monitoring
2. `cart_abandoned` - Triggers reminder sequence
3. `order_placed` - Triggers confirmation message
4. `order_delivered` - Triggers post-purchase sequence

## Message Template Lifecycle

graph TD; A[Business Requirements] --> B[Template Design]; B --> C[Template Creation]; C --> D[Template Submission]; D --> E[WhatsApp Review]; E --> F[Approval Status]; F --> G[Approved]; F --> H[Rejected]; H --> I[Revisions Required]; I --> B; G --> J[Template Activation]; J --> K[Template Usage]; K --> L[Customer Interaction]; L --> M[Response Processing]; M --> N[Analytics Collection];

Seven key message templates are required:

1. `welcome_qualifier` - First contact and qualification
2. `product_suggestions` - Curated product recommendations
3. `cart_reminder_1` - First abandonment reminder
4. `cart_reminder_2` - Second abandonment reminder
5. `order_confirmation` - Purchase confirmation
6. `post_purchase_review` - Review request
7. `upsell_offer` - Complementary product offer

## Key Success Metrics

- **Cart abandonment recovery rate increase:** Target 15%
- **Conversion rate improvement:** Target 10%
- **Customer engagement rate:** Target 25%
- **Average order value increase:** Target 8%
- **Message delivery rates:** >95%
- **System uptime:** >99.5%

## Next Steps

1. Client approval of project plan and timeline
2. Completion of Client Information Checklist
3. Setup of WhatsApp Business API account
4. Begin template creation and approval process
5. Schedule project kickoff meeting

This comprehensive solution provides a clear roadmap for implementing a powerful WhatsApp sales channel that will drive increased conversions and enhanced customer engagement.

# WhatsApp Sales Channel System Architecture Overview

This document provides a visual representation of the WhatsApp Sales Channel system architecture, showing how different components interact to deliver the customer experience.

# System Components

graph TD; A[Customer] --> B[WhatsApp]; B --> C[WhatsApp Business API]; C --> D[WhatsApp Sales Channel Application]; D --> E[Configuration Files]; D --> F[Product Catalog]; D --> G[Message Templates]; D --> H[E-commerce Platform]; D --> I[Webhooks]; I --> D; D --> J[WhatsApp API Responses]; J --> B; B --> A;

## Component Descriptions

### Customer

The end user who interacts with the business through WhatsApp.

### WhatsApp

The messaging platform used for customer communication.

### WhatsApp Business API

The official API provided by Meta for businesses to communicate with customers.

### WhatsApp Sales Channel Application

The core application that processes messages, events, and customer interactions.

### Configuration Files

JSON files that control application behavior, timing, and business rules.

### Product Catalog

Database of products with descriptions, pricing, and categorization.

### Message Templates

Pre-approved message formats required by WhatsApp Business API.

### E-commerce Platform

The client's existing online store (Shopify, WooCommerce, etc.).



# Webhooks

Real-time event notifications from the e-commerce platform to the application.

# WhatsApp API Responses

Messages sent back to customers through the WhatsApp Business API.

# Data Flow

1. Customer sends a message to the business WhatsApp number
2. WhatsApp forwards the message to the WhatsApp Business API
3. The application receives the message and processes it
4. Based on the message content and customer context, the application:
  - Retrieves relevant configuration
  - Accesses product catalog for recommendations
  - Formats messages using templates
5. The application sends responses back through the WhatsApp Business API
6. Customer receives the response on their WhatsApp client
7. When customer interacts with the e-commerce platform:
  - Webhooks notify the application of events (cart creation, order placement, etc.)
  - Application triggers appropriate WhatsApp messages
8. Application logs all interactions for analytics and debugging

# Security Considerations

- All API communications use HTTPS encryption
- Customer data is handled according to privacy regulations
- Access tokens are stored securely
- Webhook endpoints are protected with authentication

# WhatsApp Sales Channel Customer Journey

## Overview

This document illustrates the complete customer journey through the WhatsApp Sales Channel, showing how customers interact with the system at each stage.

# Complete Customer Journey Flow

graph TD; A[Customer] --> B[First Contact]; B --> C[Welcome Message]; C --> D[Qualification Questions]; D --> E[Customer Interest]; E --> F[Gifts]; E --> G[Home Decor]; E --> H[Self-Care]; F --> I[Product Suggestions]; G --> I; H --> I; I --> J[View Products CTA]; J --> K[Online Store]; K --> L[Customer Action]; L --> M[Complete Purchase]; M --> N[Abandon Cart]; N --> O[Cart Started Webhook]; O --> P[Cart Tracking]; P --> Q[Cart Inactivity]; Q --> R[45 min Reminder #1]; Q --> S[24 hr Reminder #2]; R --> T[Re-engagement]; S --> T; T --> K; M --> U[Order Confirmation]; U --> V[Order Placed Webhook]; V --> W[Shipping Updates]; W --> X[Order Delivered Webhook]; X --> Y[Post-Purchase Review]; Y --> Z[Upsell Offer];

## Stage-by-Stage Breakdown

### Stage 1: First Contact & Qualification

1. Customer initiates contact through:
  - o "Chat on WhatsApp" button
  - o QR code
  - o Click-to-WhatsApp ad
2. System sends automated welcome message
3. Customer is asked qualifying questions about their interest
4. System tags customer intent for personalized experience

### Stage 2: Product Suggestions

1. Based on customer interest, system selects relevant products
2. System sends curated product list with images and benefits
3. Customer can click "View Products" to go to online store
4. Customer browses and potentially adds items to cart

### Stage 3: Cart Abandonment Recovery

1. When customer adds items to cart, webhook notifies system
2. System begins monitoring cart activity
3. After 45 minutes of inactivity, Reminder #1 is sent
4. After 24 hours of inactivity, Reminder #2 is sent (optional)
5. Reminders include direct links to recover cart

### Stage 4: Order Management

1. When customer completes purchase, webhook notifies system
2. System sends order confirmation with details
3. System sends shipping updates as order progresses
4. System tracks delivery status

## Stage 5: Post-Purchase Engagement

1. 2-3 days after delivery, system sends review request
2. System sends upsell offer for complementary products
3. Customer can engage with review request or upsell offer
4. System tracks customer responses for future personalization

## Decision Points

### Qualification Path Selection

Customers choose from three interest paths:

- Gifts (for others)
- Home Decor (for personal space)
- Self-Care (for personal wellness)

### Cart Abandonment Response

System determines when to send reminders based on:

- Time since last cart activity
- Configurable timing settings
- Customer engagement history

### Post-Purchase Path

After delivery, system can:

- Request product reviews
- Offer complementary products
- Both sequentially

## Integration Points

### Webhook Events

1. `cart_started` - Triggers cart monitoring
2. `cart_abandoned` - Triggers reminder sequence
3. `order_placed` - Triggers confirmation message
4. `order_delivered` - Triggers post-purchase sequence

### WhatsApp Message Templates

1. `welcome_qualifier` - First contact message
2. `product_suggestions` - Curated product recommendations
3. `cart_reminder_1` - First abandonment reminder
4. `cart_reminder_2` - Second abandonment reminder
5. `order_confirmation` - Purchase confirmation
6. `post_purchase_review` - Review request
7. `upsell_offer` - Complementary product offer

## Timing Configuration

All timing is configurable in the system:

- Cart Reminder #1: 45 minutes (default)
- Cart Reminder #2: 24 hours (default)
- Post-Purchase Review: 2-3 days (default)

## Success Indicators

At each stage, the system tracks:

- Message delivery rates
- Customer response rates
- Conversion rates
- Engagement metrics