



GUPSHUP'S WHATSAPP MANUAL

Opt-In Guidelines: Do's and Don'ts, Best Practices and FAQs

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Introduction

The WhatsApp for Business Account (WABA) was launched in early 2017 and businesses were quick to adapt and improvise on their current messaging strategy. WhatsApp as a platform has become a critical and inseparable part of our online lives nowadays. From Businesses to Consumers, everyone now wants to be a part of faster, engaging, and secure communication that is agnostic to distance between the communicating parties.

This paradigm shift has pushed messaging services to the top of our Smartphone augmented lives. WhatsApp today boasts a whopping 2 billion active users worldwide however for businesses to onboard themselves with the WhatsApp Business API, there are best practices and regulations that businesses have to follow to reach out to consumers on the channel of their choice!

Opt-in Management

Opt-in is the consent given by your customer agreeing to receive messages from your business on WhatsApp. As per WhatsApp's policy, businesses are required to get opt-ins from customers before sending a WhatsApp message to them.

These WhatsApp opt-ins can be collected on a third-party channel or WhatsApp itself by leveraging the 2-way conversational flow.

This requires your business to collect the opt-ins via an existing channel of communication - for example, **SMS, Missed call, Website, In-App notifications, IVR, email, or via a WhatsApp thread.**

Opt-in Management : Guidelines

WhatsApp's policy requires businesses to follow a few requirements while collecting opt-ins. Your business will need to adhere to the below practices:

- You will have to clearly state that the **customer is opting in to receive messages from your business on WhatsApp.**

- You will need to explicitly **mention the business' name** that the customer is opting in to receive messages from.
- As a business you will also need to ensure that you are **complying with the applicable law**.

With Gupshup, our **existing Business to User communication** channels combined with opt-in APIs are ready to be consumed and can be leveraged in multiple ways to drive opt-in collection to the business's complete potential.

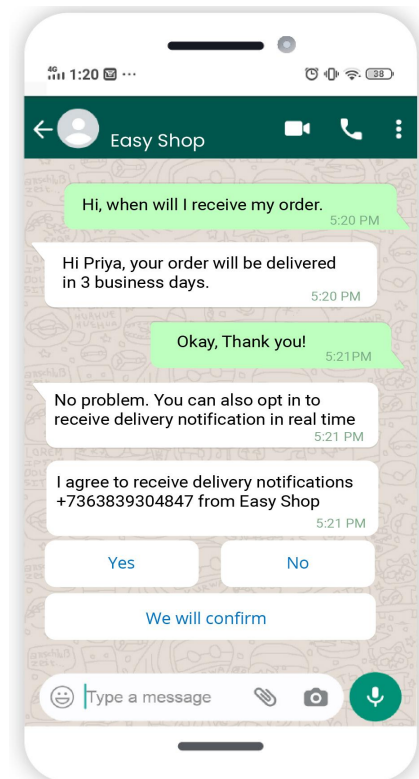
WhatsApp's strict no-no policy for spam

Driving a *high-quality messaging experience* for their users has always been a top priority for WhatsApp. This is in place to ensure that messages initiated by businesses are not promotional or in any way considered marketing spam, but are purely transactional in nature.

Ways of Collecting Customer Opt-in

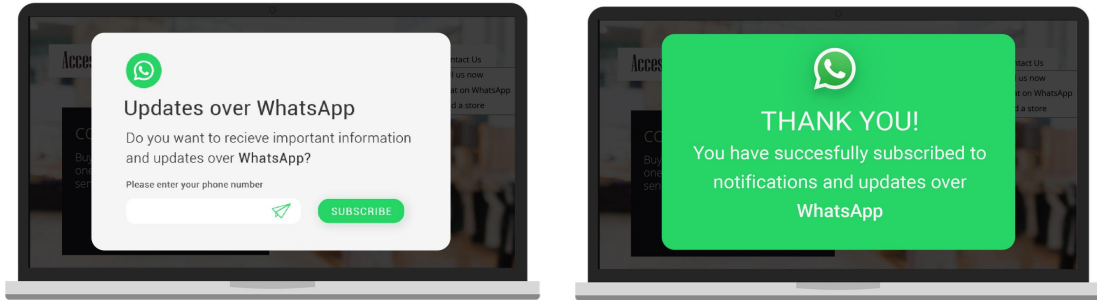
1. WhatsApp User-Initiated Messages: Enhancing existing user journeys or capturing opt-in with keyword responses is the most effective way of collecting user consent. With the visual representation in place, there is no better way to capture consent for WhatsApp on WhatsApp itself!

Once a user reaches out, the corresponding message to the user could be to receive WhatsApp updates in the future. We can also add keywords like **'Start'** or **'Opt-in'** to consider user consent.

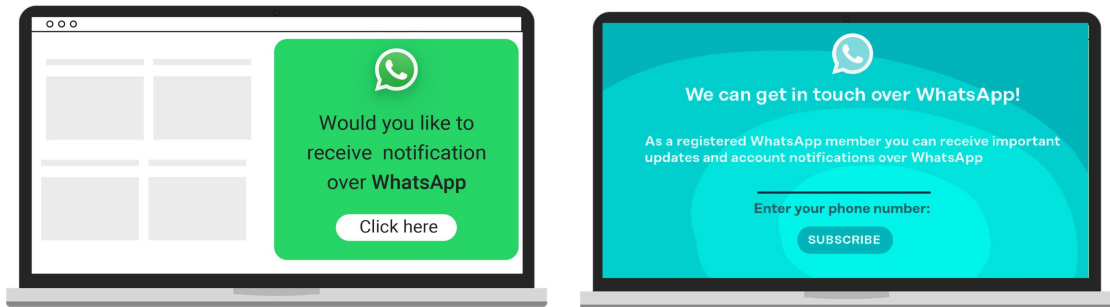


2. Website: Website and Phone Apps provide users an elevated customer experience. It defines the core business model hence your website is a great channel to use when inviting new and existing customers to receive messages over WhatsApp. **This can be done by integrating with Gushup's Opt-In API.**

- a. *Create a Website Widget to redirect users to your chatbot:* An embedded deep link can be placed as a chat widget on the user's website. Once the user clicks that, they are directed to WhatsApp with a Pre-Filled text. On initiating the conversation, the user's number can be opted-in
- b. *Include a check-box in the customer journey :* Add a checkbox or a placeholder in the customer journey on the website. Once the user clicks 'accept' the business can call Gupshup opt-in API to whitelist the phone number number.

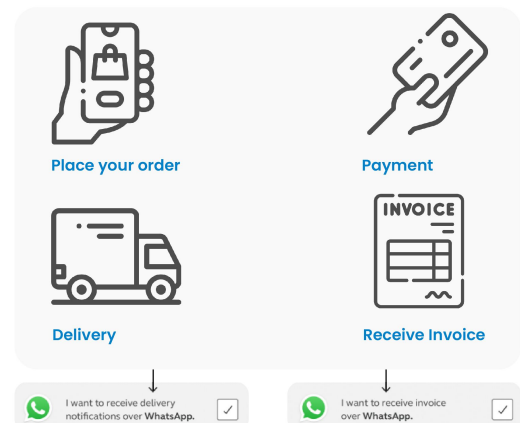


- c. *Inform the customer about the availability of a new channel* : Businesses need to inform end consumers about the availability of WhatsApp. There could be a permanent ticker running on the top of the home page informing customers of the same.

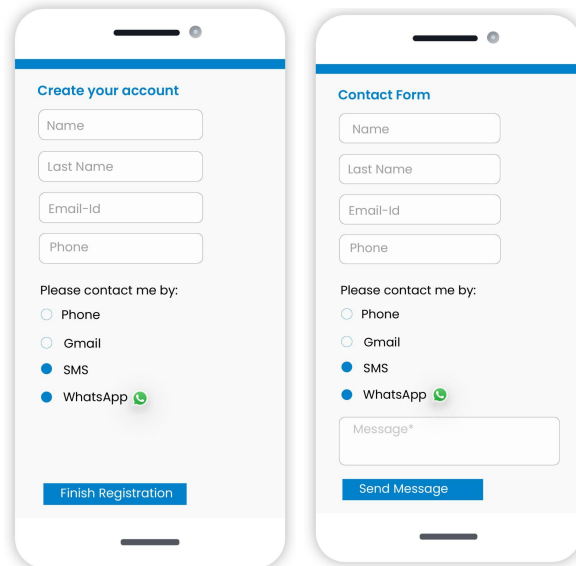


3. In-App Notifications/Purchase Journeys: Notifications pertaining to actual transactions i.e. **Order Placement Confirmation, Money Withdrawal, Delivery, and Shipment** are best received by the end consumer. Hence, customers will be more inclusive to opting-in during the purchase journey thereby increasing the opt-in rate. Businesses can easily include a checkbox at various touchpoints where the customer would enter their phone number – for example, when they are entering their billing or delivery information.

- a. *Include WhatsApp in Purchase journeys:*
While signing out or completing payment, users can be given an option to receive important documentation on WhatsApp. Invoice, Booking Confirmation, Boarding Pass, and Airline/Train tickets can be downloaded directly on WhatsApp making it convenient for the user to revisit.



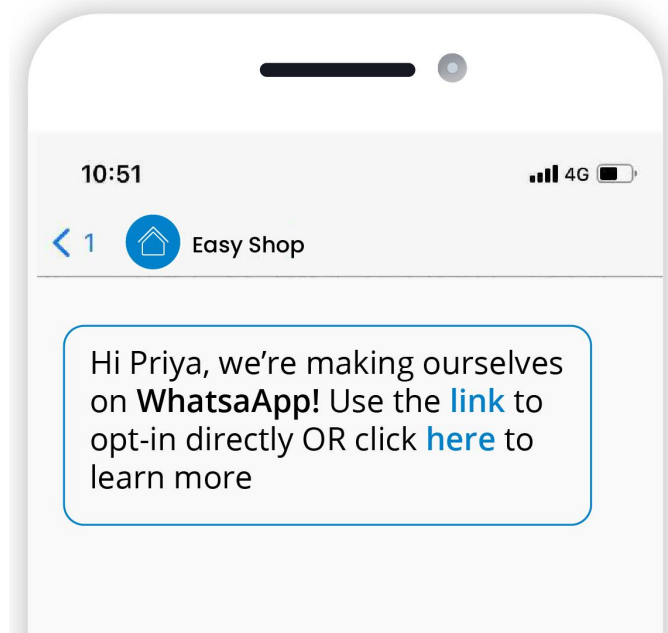
- b. *Add to Customer communication Channel List:* While asking user preferences on the preferred channel of communication, add WhatsApp to the list. Adding the WhatsApp logo creates recall value and informs customers what they are signing up for. The ROI derived from reaching out to customers on a channel of their choice is much higher than spamming on all channels as the latter leads to users blocking/unsubscribing and ignoring important messages.



The image displays two mobile application screens side-by-side. The left screen, titled 'Create your account', features input fields for Name, Last Name, Email-Id, and Phone. Below these fields, a section titled 'Please contact me by:' contains four radio button options: Phone, Gmail, SMS, and WhatsApp. The WhatsApp option is selected, indicated by a blue dot and a green WhatsApp logo. At the bottom of the screen is a blue button labeled 'Finish Registration'. The right screen, titled 'Contact Form', has input fields for Name, Last Name, Email-Id, and Phone. Below these fields, a section titled 'Please contact me by:' contains the same four radio button options, with WhatsApp selected. Below this section is a text input field labeled 'Message*'. At the bottom of the screen is a blue button labeled 'Send Message'.

4. Third-Party Channels - SMS/Missed Call/Email/IVR: Businesses have multiple communication channels with their customers like SMS/Email/IVR are often used to send out transactional and informational notifications. Gupshup can enable opt-in for your business for each of these channels. They're great, cost-effective techniques where businesses can collect opt-in from existing channels of communication.

1. **SMS:** Businesses can tweak existing SMS communication by providing a link/missed call number informing users that they can now opt-in to receive WhatsApp notifications. Gupshup can provide missed call numbers as well, where the user gives a call on a dedicated number and their number is whitelisted.



2. *Email:* Users can receive an option of 'one-click' opt-in with SMS and Email Solutions. Both of the communication channels work well as a door opener, whereby users can click to immediately receive notifications over WhatsApp in the future.
3. *IVR:* Automated IVRs are current client servicing and customer points of contact for businesses. Set up an automated voice message and request the customer to press a specific key on their dial-pad to provide their consent.

5. QR Codes: Gupshup Analytical Panel gives businesses the ability to create QR codes. These can then be printed out and placed at various physical touchpoints between businesses and users. The user can scan and be redirected to the WhatsApp handle of the business with a prefilled text like Start/Opt-in, once sent the user is now an opted-in customer

6. User Incoming-Messages: Gupshup can enable users to opt-in for Keywords for incoming messages. If a user sends 'Start' or 'Opt-in' it can be considered as an Opt-in.

Best Practices and Maximizing Opt-in Rates

1. **Opt-ins prevent businesses from being reported or blocked by the user.** It creates recall value and provides consent to enter the user's inbox. This is why it helps businesses maintain Phone Number Quality Rating.
2. As per WhatsApp Opt-in Policy Update - **Opt-ins do not have to be explicit anymore.** Businesses can leverage pre-filled check boxes, adding them to terms and conditions however the communication needs to add value for the user to avoid being reported or blocked by messaging tiers.
3. Add an **opt-out mechanism** in each template - Some users may simply be spooked that they do not have any way of opting out. This will help preserve the quality rating.
4. Send a **welcome/confirmation notification** as soon as the **user signs up** or **opts into WhatsApp** so that they make the memory/connection that they just opted in and that's why they have received the message. Include the opt-out option here, so they know how to opt-out if they ever want to.
5. Add an **auto-response on WhatsApp** so that users don't have a poor experience when they try to message the number after receiving a notification.
6. Gupshup's **opt-in and opt-out APIs provide a scalable solution to maximize opt-in collection via website/in-app and other user journeys.**
7. **Avoid going overboard** and messaging customers too frequently
8. While collecting opt-ins, it is best to **specifically state the type of messages** that your customers can expect to receive from your business

For more information or help please write to whatsappsupport@gupshup.io