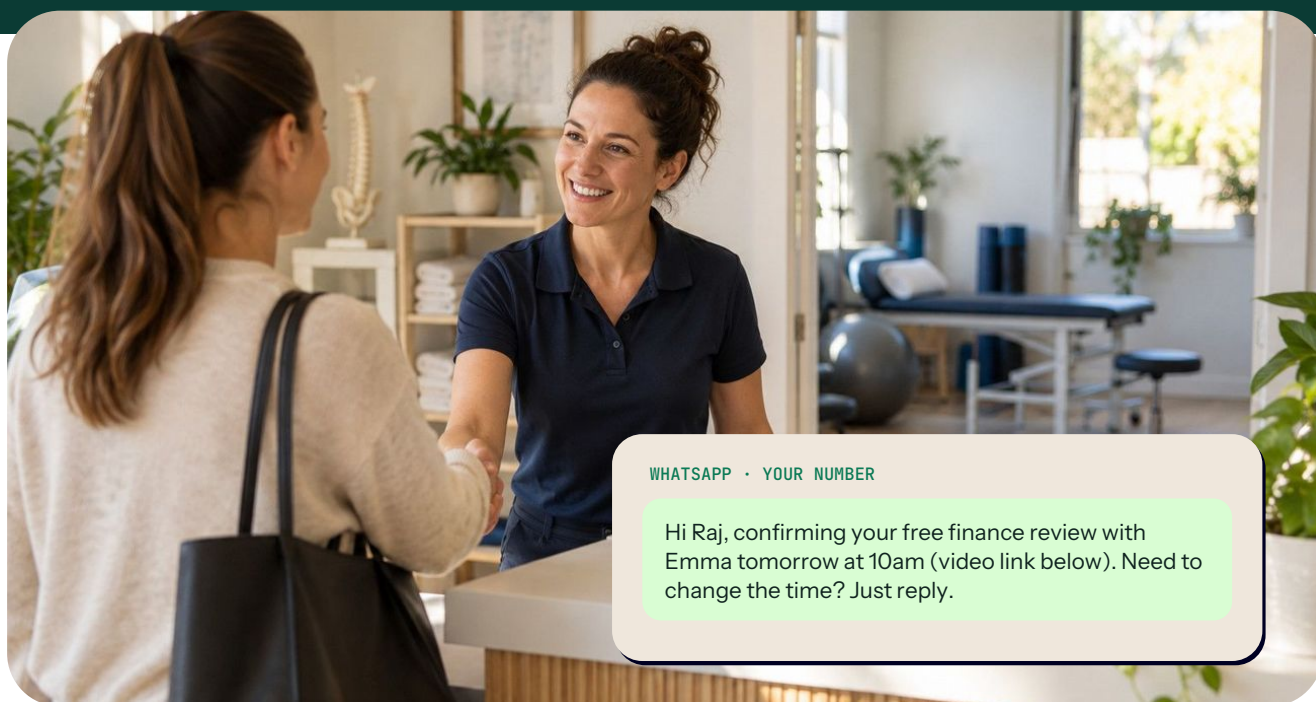


Get the meeting booked, then get them there.

Invite leads to book a consultation, confirm it instantly and remind them before the meeting, all on WhatsApp.



INSIDE THIS GUIDE

- The moment and why it slips
- A sample conversation
- Message templates to adapt
- Node-by-node build
- How the journey works
- The data you need
- Example sheet
- What to measure

01

At a glance

TEAM

Sales

STARTS FROM

Google Sheets, Zapier

TRIGGER

A booking appears in your sheet (from your calendar or booking tool through Zapier), or a lead is marked “ready to book”.

GOAL

More consultations booked and attended.

STOPS WHEN

Meeting takes place, is cancelled, or the customer opts out.

LIKELY META CATEGORY

Utility. Meta confirms it when it reviews your template.

02

In practice

Getting a meeting booked is half the battle; getting the person to show up is the other half. Confirm the booking instantly with who, when and where, remind them the day before and an hour before, and let them reschedule by replying instead of vanishing.

03

The moment

THE MOMENT

A lead agreed to a consultation but never picked a time.

WHY IT SLIPS TODAY

Scheduling back-and-forth kills momentum, and booked consultations still get forgotten.

WHAT CHANGES

More consultations booked and attended.

04

How the journey works

The steps on the left, and what your customer sees on the right.

Trigger: A booking appears in your sheet (from your calendar or booking tool through Zapier), or a lead is marked “ready to book”.

1

Invite

Send your booking link to leads ready to meet.

2

Confirm

When booked, confirm the time, place and who they’re meeting.

3

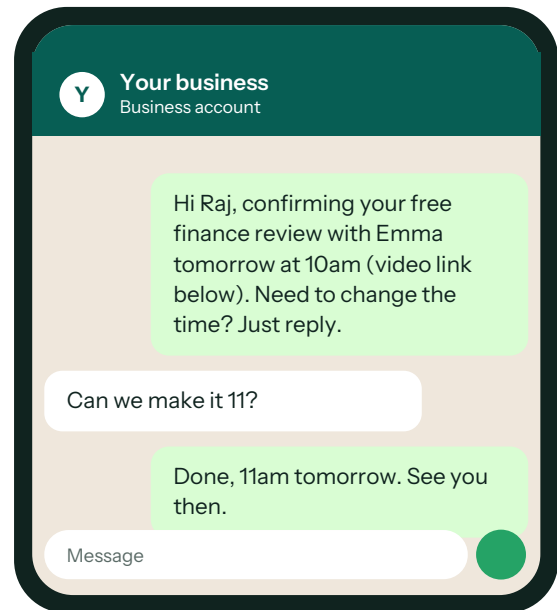
Remind

A reminder the day before and a short one an hour before.

4

Follow up

After the meeting, the salesperson’s next step.



A fictional example. Write templates in your own voice and get them approved by Meta.

Stops when

Meeting takes place, is cancelled, or the customer opts out.

05

Data you need

Each item is a column in your Google Sheet, a field from Zapier or a Shopify property. Only the WhatsApp number is required.

- First name
- WhatsApp number
- Meeting date and time
- Location or video link
- Staff member

06

Set it up in ConvoHut

- [] Send bookings from your calendar tool to a sheet or through Zapier.
- [] Create invite, confirmation and reminder templates.
- [] Set reminder waits based on the meeting time.
- [] Route reschedule replies to the right person.

07 The message sequence

Example templates. `{{variables}}` are filled from your sheet or store. Submit each one to Meta for approval.

1. On booking

UTILITY · `booking_confirm_v1`

Confirmed, `{{first_name}}`: `{{meeting}}` with `{{staff}}` on `{{date}}` at `{{time}}`.
`{{location_or_link}}`

2. Day before (due list)

UTILITY · `booking_reminder_v1`

Reminder: `{{meeting}}` with `{{staff}}` tomorrow at `{{time}}`. Need to change it? Just reply.
Buttons: Confirm | Reschedule

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	meeting	staff	date	time
Raj	+614... ..	Finance review	Emma	Thu 2 Oct	10:00am
Sue	+614... ..	Design consult	Leo	Thu 2 Oct	2:00pm
Ivy	+614... ..	Demo	Kai	Fri 3 Oct	11:00am

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	Bookings from your calendar tool via Zapier.
SEND MESSAGE	<code>booking_confirm_v1</code>	
END FLOW		
TRIGGER	New Sheet Row	A "tomorrow's meetings" tab.
SEND MESSAGE	<code>booking_reminder_v1</code>	
WAIT FOR REPLY	Timeout: 12 hours	
NOTIFY ME	On reply	Reschedule requests go to the organiser.
END FLOW		

10

Branches

ON REPLY

Reschedule requests alert the organiser, who updates the calendar.

ON TIMEOUT

No reply means no action; the meeting stands.

ON OPT-OUT

The contact leaves the journey and is excluded from future marketing messages.

11

Mistakes to avoid

- Missing the time zone or video link.
- Only one reminder, a week out.
- Making people call to reschedule.

12

Measure and improve

What to measure

- Booking link clicks
- Consultations booked
- Attendance rate
- Reschedule requests handled

Good practice

- Always include the time zone and the link or address.
- Let people reschedule by replying.
- Remind twice.

13

Variations to try

- Brokers and advisers
- Software demos
- Design and renovation consultations
- Clinics' initial appointments

14

Questions

Does ConvoHut have a calendar?

No. Keep using your booking tool; ConvoHut sends the confirmations and reminders from each booking.

Can someone reschedule by replying?

Their reply lands in your inbox and alerts your team, who can change the booking.

15

Responsible messaging

Consent first

Only message people who have given you their WhatsApp number and agreed to hear from you. Include a clear way to opt out of marketing messages, honour opt-outs immediately and keep sensitive personal details (such as health information) out of messages.

16

Your next steps

1

Pick a journey

Choose the follow-up with the clearest goal for your business.

2

Connect your data

A Google Sheet, Zapier app or Shopify store. Only the phone number is required.

3

Go live in a week

Get templates approved, test with your own number and switch it on.

READY TO START?

Start your 7-day free trial

Free onboarding, training and Meta verification help on every plan. Connect your number in about 15 minutes.

dashboard.convohut.com · Book a demo: convohut.com/demo