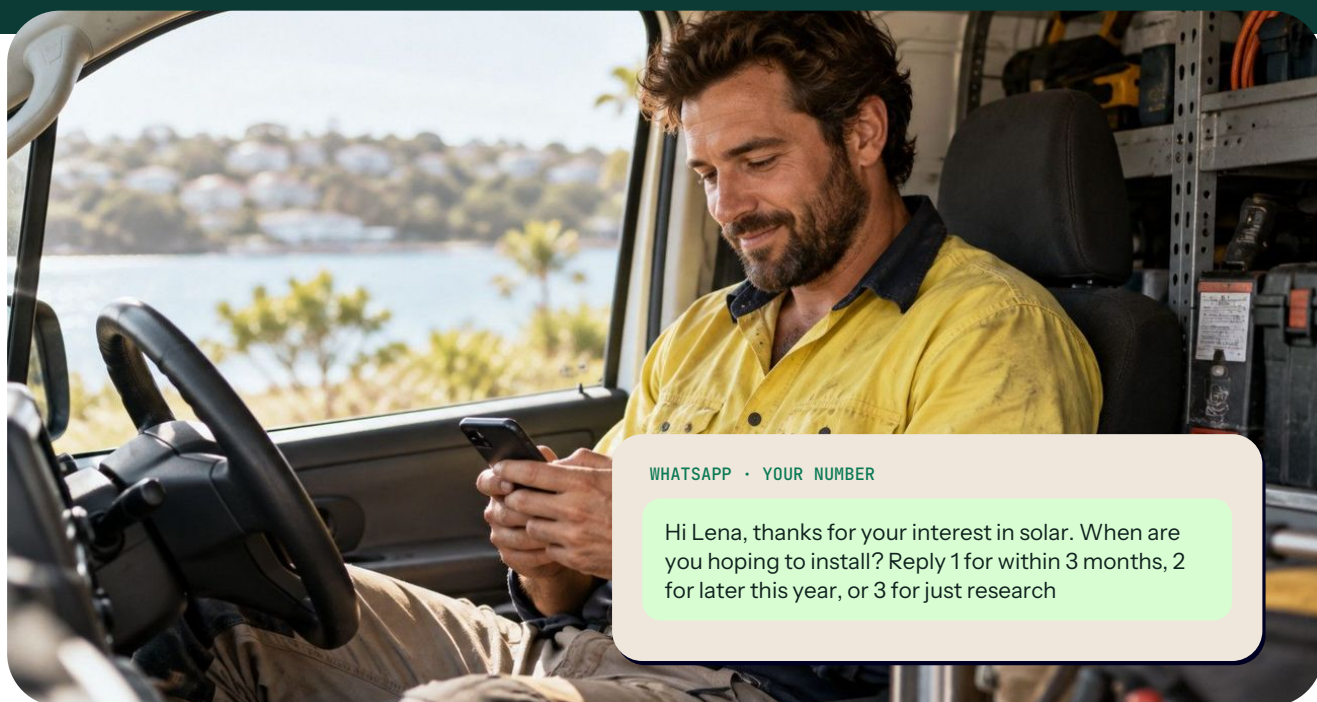


Know who's ready to buy before you call.

Ask new leads two or three quick questions on WhatsApp, branch on their answers, and send the hottest leads straight to a salesperson.



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 new lead row arrives in your sheet or through Zapier.

GOAL

Salespeople spending their time on the leads most likely to buy.

STOPS WHEN

Answer received and routed, opt-out, or no reply after two messages.

LIKELY META CATEGORY

Utility or Marketing, depending on wording. Meta confirms it when it reviews your template.

02

In practice

Not every lead is ready to buy, and salespeople waste hours finding out. One or two quick questions with reply buttons sort leads into “ready now”, “later” and “not a fit”, so the hottest ones go straight to a person and the rest get something useful instead of a pushy call.

03

The moment

THE MOMENT

Fifty enquiries came in this week. Only ten are ready to buy, but you don't know which.

WHY IT SLIPS TODAY

Sales teams spend hours calling leads who aren't ready, while the ones who are wait.

WHAT CHANGES

Salespeople spending their time on the leads most likely to buy.

04

How the journey works

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

Trigger: A new lead row arrives in your sheet or through Zapier.

1

Ask

A first message with one simple question, e.g. timeline or budget range, using reply buttons if your template has them.

2

Branch

Route by the answer: ready now, researching, or not a fit.

3

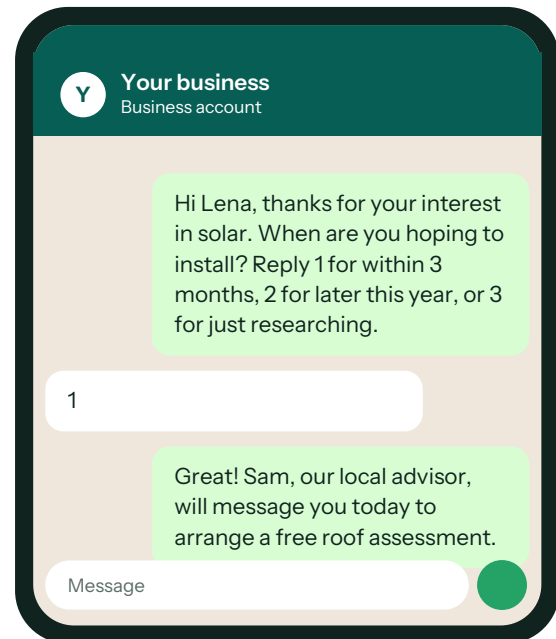
Hand over

“Ready now” leads notify a salesperson immediately.

4

Nurture

Others get a helpful resource and a check-in later.



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

Stops when

Answer received and routed, opt-out, or no reply after two messages.

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
- Enquiry type
- Source
- Owner (optional)

06 Set it up in ConvoHut

- [] Decide your qualifying question and the answers that matter.
- [] Create templates for the question and each follow-up.
- [] Set branches based on replies.
- [] Choose which salesperson is notified.
- [] Test each branch.

07 The message sequence

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

1. Immediately

UTILITY · `qualify_timeline_v1`

Hi `{{first_name}}`, thanks for your interest in `{{product}}`. When are you hoping to get started?

Buttons: Within 3 months | Later this year | Just researching

2. On “Within 3 months”

UTILITY · `qualify_handover_v1`

Great! `{{rep_name}}` will message you today to arrange a free assessment.

3. On other answers

MARKETING · `qualify_nurture_v1`

Thanks `{{first_name}}`. Here’s our buyer’s guide in the meantime: `{{guide_link}}`. Reply any time.

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	product	source	rep_name
Lena	+614... ..	Solar 6.6kW	Website	Sam
Harry	+614... ..	Battery	Facebook form	Sam
Mei	+614... ..	Solar 10kW	Referral	Jo

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	Leads from your form or Zapier.
SEND MESSAGE	qualify_timeline_v1	Template with three quick-reply buttons.
WAIT FOR REPLY	Timeout: 1 day	
CONDITION	Reply is "Within 3 months"	Branches on the answer.
SEND MESSAGE	qualify_handover_v1	Ready-now path.
NOTIFY ME	Ready now	The rep is alerted immediately.
SEND MESSAGE	qualify_nurture_v1	Other answers.
END FLOW		

10 Branches

ON REPLY

Ready-now leads alert a salesperson straight away. Others get the guide.

ON TIMEOUT

Leads who don't answer within a day get one nudge, then the journey ends.

ON OPT-OUT

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

11 Mistakes to avoid

- Asking about budget in the first message.
- Free-text questions when buttons would do.
- Leaving ready-now leads waiting overnight.

12 Measure and improve

What to measure

- Leads answering the question
- Leads routed as "ready now"
- Appointments booked by branch
- Time from reply to salesperson contact

Good practice

- Ask one question at a time.
- Make answers easy: numbers or buttons.
- Never leave a "ready now" lead waiting.

13

Variations to try

- Solar and home improvement
- Finance and insurance brokers
- Property sales and rentals
- B2B services

14

Questions

Can ConvoHut branch on what the customer replies?

Yes. Journeys can branch based on a reply or on no reply within a time limit.

Is this a chatbot?

It's a structured journey with set questions and branches, with a person taking over. AI-generated replies are on our roadmap, not available today.

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