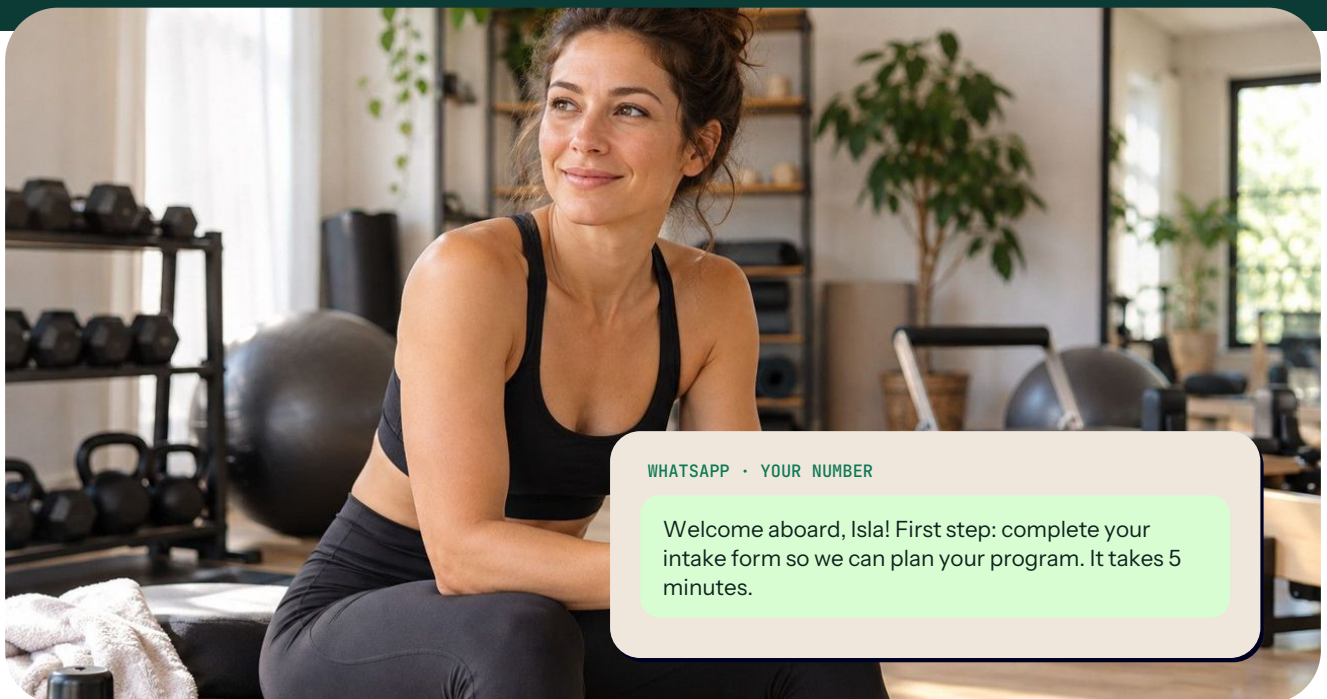


Help new customers get started, step by step.

Guide new customers or members through their first days with short, timely WhatsApp messages, and answer questions in the same thread.



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

Support

STARTS FROM

Google Sheets, Zapier

TRIGGER

A new customer row is added when they sign up, with a column for each onboarding step.

GOAL

Faster setup, fewer stuck customers and fewer early cancellations.

STOPS WHEN

All onboarding steps completed, or opt-out.

LIKELY META CATEGORY

Utility. Meta confirms it when it reviews your template.

02

In practice

New customers get stuck on the same few steps. A short message for each step, sent when the previous one is done, gets them set up faster than a long welcome email, and puts help one reply away.

03

The moment

THE MOMENT

A new client signed up for your service but hasn't completed their intake form.

WHY IT SLIPS TODAY

New customers get a long welcome email and then silence. They get stuck, and some ask for refunds.

WHAT CHANGES

Faster setup, fewer stuck customers and fewer early cancellations.

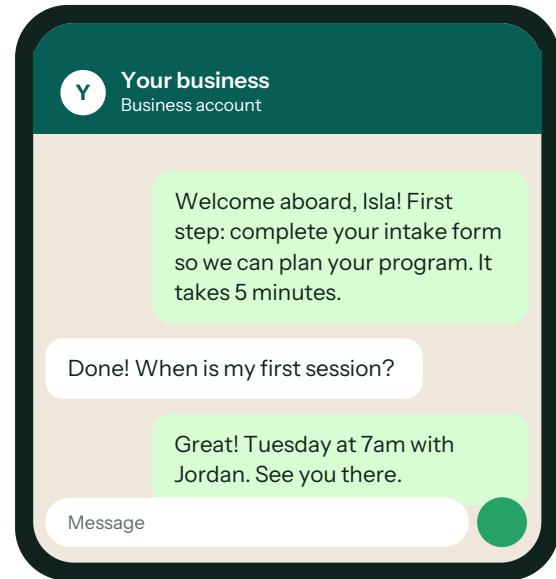
04

How the journey works

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

Trigger: A new customer row is added when they sign up, with a column for each onboarding step.

- 1 **Day 0**
Welcome and the one thing to do first.
- 2 **Check**
If the first step isn't done after two days, a friendly reminder.
- 3 **Next step**
When a step is completed in the sheet, send the next one.
- 4 **Help**
Replies go to their account owner.



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

Stops when

All onboarding steps completed, or opt-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
- Start date
- Next step
- Owner

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Set it up in ConvoHut

- [] List your onboarding steps as sheet columns.
- [] Create a template for each step.
- [] Use branches to check completion.
- [] Assign an owner for replies.

07 The message sequence

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

1. Day 0

UTILITY · onboard_step1_v1

Welcome aboard, `{{first_name}}`! First step: `{{step_1}}` (`{{link}}`). It takes about 5 minutes.

2. 2 days later, if step 1 isn't done

UTILITY · onboard_nudge_v1

Hi `{{first_name}}`, a reminder to `{{step_1}}` so we can get you started. Need help? Just reply.

3. When step 1 is done

UTILITY · onboard_step2_v1

Nice work, `{{first_name}}`! Next: `{{step_2}}`.

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	start_date	step_1_done	owner
Isla	+61 4... ..	29 Sep	no	Jordan
Mo	+61 4... ..	29 Sep	yes	Jordan
Grace	+61 4... ..	30 Sep	no	Kim

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	New customer sign-ups.
SEND MESSAGE	onboard_step1_v1	
WAIT	2 days	
CONDITION	step_1_done is "no"	
SEND MESSAGE	onboard_nudge_v1	
NOTIFY ME	If still stuck	The account owner offers help.
END FLOW		

10

Branches

ON REPLY

The account owner helps personally.

ON TIMEOUT

The owner is notified to call if the step still isn't done.

ON OPT-OUT

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

11

Mistakes to avoid

- All steps in one message.
- No named person to reply to.
- Carrying on after they're set up.

12

Measure and improve

What to measure

- Customers completing onboarding
- Days to complete
- Replies asking for help
- Early cancellations

Good practice

- One step per message.
- Celebrate progress.
- Make help one reply away.

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Variations to try

- Personal training and gyms
- Accountants and advisers
- Schools and courses
- Software products

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Questions

Can the next message wait until a step is done?

Yes, if the step status is in your sheet. The journey checks it before sending.

How many messages is too many?

Most onboarding needs three to five over two weeks. Stop when they're set up.

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.

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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