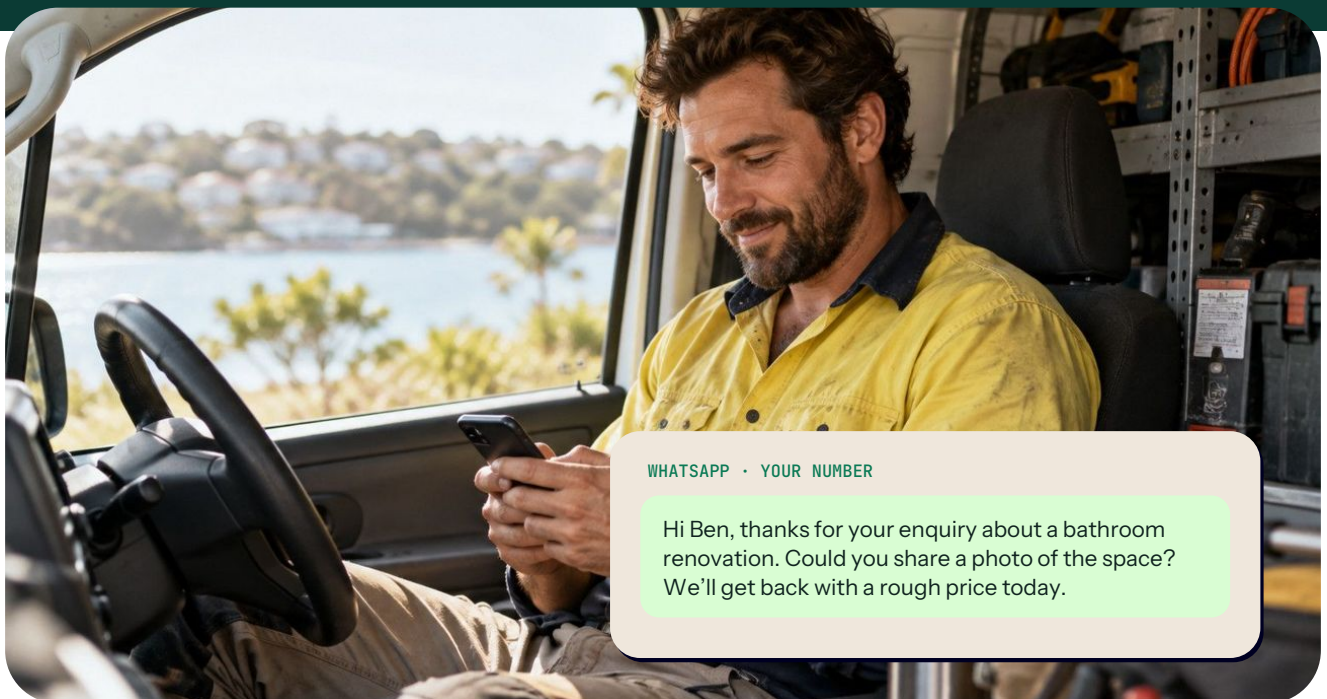


WhatsApp for sales teams

Answer first. Follow up every time. Close more of what you already have. Reply to every lead in moments, qualify with one-tap questions, chase quotes and invoices, and hand warm buyers to a person.



INSIDE THIS GUIDE

- Why WhatsApp works for sales
- Trigger, journey and goal for each
- What to measure
- 9 sales use cases
- A 30-day launch plan
- Responsible messaging

01

Why WhatsApp works for sales

REASON 1

Leads can answer in seconds from their phone, without a call or email thread.

REASON 2

Your team is notified the moment a lead replies, with the full conversation in one inbox.

REASON 3

Follow-ups run on a schedule, so no quote or enquiry depends on someone remembering.

02

9 sales use cases

Each has a full playbook on convohut.com.

Speed-to-lead follow-up

When an enquiry comes in, start a WhatsApp conversation straight away, and alert your team the moment the lead replies.

TRIGGER A new enquiry lands as a row in your sheet (from your website form, booking tool or Zapier).

JOURNEY Send › Notify › Follow up › Stop

GOAL More enquiries turning into conversations, appointments and sales.

Full playbook: convohut.com/use-cases/whatsapp-lead-follow-up/

Lead qualification

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

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

JOURNEY Ask › Branch › Hand over › Nurture

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

Full playbook: convohut.com/use-cases/whatsapp-lead-qualification/

Quote follow-up

Follow up every quote automatically on WhatsApp with a question they can answer in seconds, and stop the moment they reply.

TRIGGER A quote row is added to your sheet when the quote is sent (from your quoting tool, CRM export or manually).

JOURNEY Wait › Check in › Wait again › Final › Notify

GOAL More quotes getting a decision, fewer lost to silence.

Full playbook: convohut.com/use-cases/whatsapp-quote-follow-up/

Consultation and demo bookings

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

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

JOURNEY Invite › Confirm › Remind › Follow up

GOAL More consultations booked and attended.

Full playbook: convohut.com/use-cases/whatsapp-consultation-booking/

Payment and invoice reminders

Send friendly reminders before and after an invoice is due, with the amount and your payment link, straight from your accounting export.

TRIGGER Your accounting tool’s export (or a Zapier connection) adds invoices to a sheet with due dates.

JOURNEY Before due › On due › Overdue › Escalate

GOAL Invoices paid sooner, with less time spent chasing.

Full playbook: convohut.com/use-cases/whatsapp-payment-reminders/

Renewal reminders

Remind customers before a membership, policy, subscription or registration expires, with one tap to renew or a reply to ask questions.

TRIGGER A due list shows customers whose renewal date is within your chosen window.

JOURNEY Early reminder › Final reminder › Save › Lapsed

GOAL More renewals, and a chance to save the customers who were thinking of leaving.

Full playbook: convohut.com/use-cases/whatsapp-renewal-reminders/

Trial and intro offer conversion

Check in during the trial, help people get value quickly and make the offer before it ends.

TRIGGER A trial sign-up row is added to your sheet from your booking or membership tool.

JOURNEY Welcome › Check in › Offer › Last chance

GOAL More trials turning into memberships or paid plans.

Full playbook: convohut.com/use-cases/whatsapp-trial-conversion/

Missed call follow-up

When you miss a call, send a WhatsApp message so the customer doesn’t call the next business on the list.

TRIGGER Your phone system or call-tracking tool logs a missed call to a sheet or through Zapier.

JOURNEY Send › Notify › Stop

GOAL More missed calls turned into conversations and bookings.

Full playbook: convohut.com/use-cases/whatsapp-missed-call-follow-up/

Upsell and cross-sell

After a purchase or visit, recommend what naturally goes with it, and let customers ask questions before they buy.

TRIGGER An order is fulfilled in Shopify, or a purchase row with a product category is added to your sheet.

JOURNEY Wait › Recommend › Answer › Stop

GOAL Higher order values from relevant recommendations.

Full playbook: convohut.com/use-cases/whatsapp-upsell/

03

Your first 30 days

1

Week 1

Connect your WhatsApp Business Account and the sheet, Zapier app or Shopify store that holds your customer data. Complete Meta business verification with our help.

2

Week 2

Pick one use case with a clear goal. For sales teams, speed-to-lead follow-up or lead qualification are good first choices. Write and submit the templates.

3

Week 3

Test with your own number and a few colleagues: every branch, every stop rule, an opt-out.

4

Week 4

Go live, watch replies daily, and review the numbers after two weeks before adding the next journey.

04

What to measure

- Time from enquiry to first message
- Reply rate and qualified replies
- Quotes accepted, meetings booked
- Invoices paid after reminders

05

Responsible messaging

Consent first

Message people who have agreed to hear from you on WhatsApp, include an opt-out in marketing templates, and keep sensitive details out of messages. Meta reviews every template before you can use it.

06

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