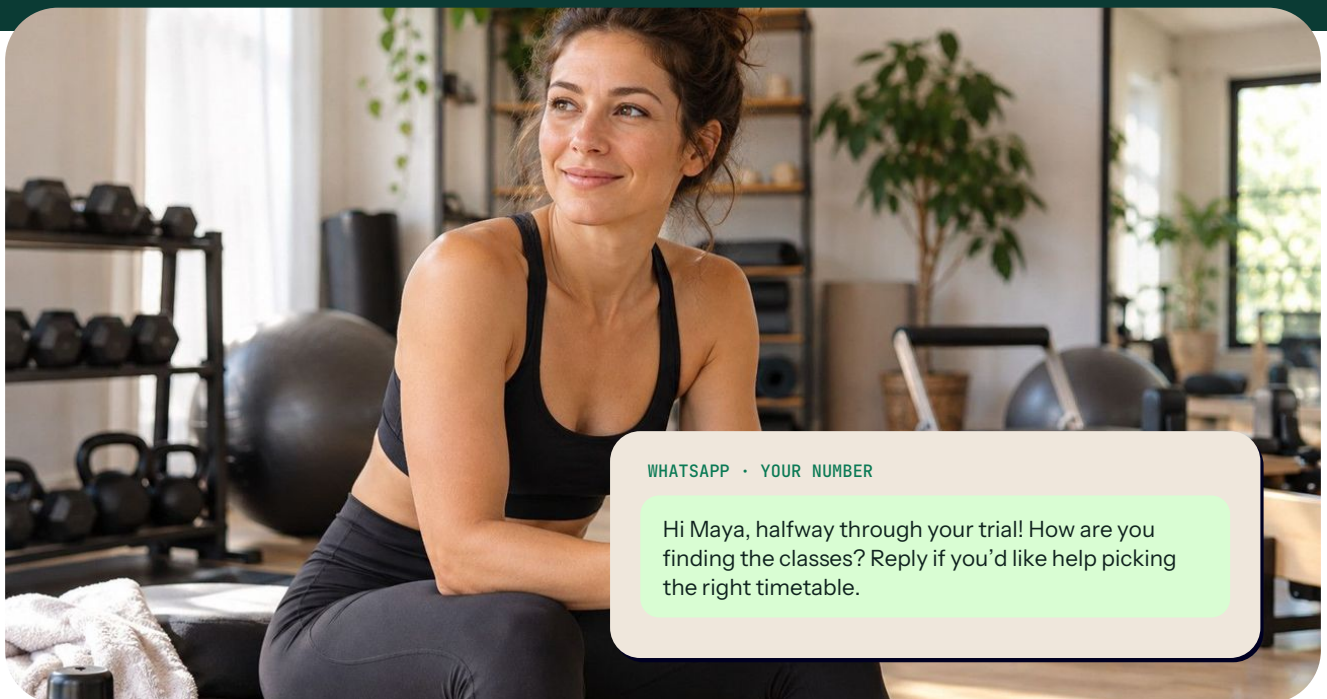


Turn trial members into paying customers.

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



WHATSAPP • YOUR NUMBER

Hi Maya, halfway through your trial! How are you finding the classes? Reply if you'd like help picking the right timetable.

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

GOAL

More trials turning into memberships or paid plans.

STOPS WHEN

Converted to paid, reply, opt-out, or trial ends.

LIKELY META CATEGORY

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

02

In practice

A trial converts when people get value fast. Check in during the trial, help them build a habit, then make the offer before it ends, based on what they've actually used.

03

The moment

THE MOMENT

A new member started a 14-day trial pass and has been to one class.

WHY IT SLIPS TODAY

Trials end quietly. People who haven't built a habit drift off, and nobody asks why.

WHAT CHANGES

More trials turning into memberships or paid plans.

04

How the journey works

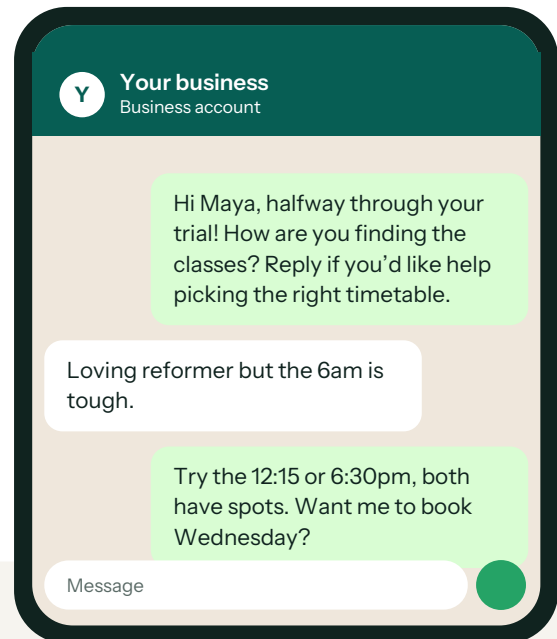
The steps on the left, and what your customer sees on the right.

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

- 1 **Welcome**
Day 1: what to do first.
- 2 **Check in**
Mid-trial: how's it going? Offer help.
- 3 **Offer**
Two days before the end: the offer to continue.
- 4 **Last chance**
On the last day, one final reminder.

Stops when

Converted to paid, reply, opt-out, or trial ends.



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

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
- Trial start and end dates
- Usage (visits, logins)
- Offer

06

Set it up in ConvoHut

- [] Send trial sign-ups to a sheet.
- [] Create day-1, mid-trial and offer templates.
- [] Add a converted column to exit paying customers.
- [] Route replies to front desk or sales.

07

The message sequence

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

1. Day 1

UTILITY · trial_welcome_v1

Welcome, {{first_name}}! Your trial runs until {{end_date}}. First step: {{first_step}}.

2. Mid-trial

MARKETING · trial_checkin_v1

Halfway through, {{first_name}}! How's it going? Reply if you'd like help getting more out of it.

Buttons: Going well | I need help

3. 2 days before the end

MARKETING · trial_offer_v1

Your trial ends {{end_date}}, {{first_name}}. Keep going with {{offer}}: {{link}}

Buttons: Join now

08

Example sheet

Only the phone column is required. Example data only.

first_name	phone	start_date	end_date	visits	offer
Maya	+614... ..	22 Sep	6 Oct	1	First month \$49
Tom	+614... ..	23 Sep	7 Oct	4	First month \$49
Aisha	+614... ..	24 Sep	8 Oct	2	First month \$49

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	Trial sign-ups.
SEND MESSAGE	trial_welcome_v1	
WAIT	7 days	
SEND MESSAGE	trial_checkin_v1	
WAIT FOR REPLY	Timeout: 5 days	On reply: Notify Me.
NOTIFY ME	On reply	
SEND MESSAGE	trial_offer_v1	After the wait.
END FLOW		

10 Branches

ON REPLY

The team helps with timetables, setup or questions.

ON TIMEOUT

The offer still goes out two days before the end.

ON OPT-OUT

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

11 Mistakes to avoid

- Selling before helping.
- One offer for everyone, regardless of usage.
- Nothing after the trial ends.

12 Measure and improve

What to measure

- Trials started
- Replies during trial
- Trial-to-paid conversions
- Offer redemptions

Good practice

- Help first, sell second.
- Base the offer on what they used.
- Make continuing easy.

13

Variations to try

- Gyms and studios
- Software free trials
- Tutoring and courses
- Subscription boxes

14

Questions

Can the journey use data like visit count?

Yes, if the column is in your sheet. Branch on it to send the right message.

What if they convert early?

Update the sheet status and they leave the journey.

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