

# THE WHATSAPP ENTERPRISE BLUEPRINT



# How European brands like **Adidas** and *MediaMarkt* are boosting retention and revenue with WhatsApp marketing – and how you can too





# ***AFTER THIS, YOU'LL BE ABLE TO:***

- ✧ Start with WhatsApp marketing with minimal risk
  - ✧ Ensure WhatsApp works with email (not against it)
  - ✧ Scale WhatsApp smoothly across your enterprise
  - ✧ Maximize profitability in WhatsApp
  - ✧ Choose the right WhatsApp marketing platform
- 

## ***WHO IS THIS GUIDE FOR?***

*This guide is for you if you hold any of these roles at an enterprise brand:*

- › CMO/CDOs
  - › eCommerce, marketing and CRM leaders
  - › Email marketing managers
  - › CRM team members
- 

***SHARE  
WITH  
A COLLEAGUE***



Scan to get this  
in WhatsApp

# WHAT'S INSIDE?

**.01** page  
.02

The WhatsApp opportunity in  
Europe for enterprise brands

**.02** page  
.02

The WhatsApp  
enterprise blueprint

- How to get started
- How to be efficient
- How to be profitable

**.03** page  
.02

How to choose a WhatsApp  
marketing platform

**.04** page  
.02

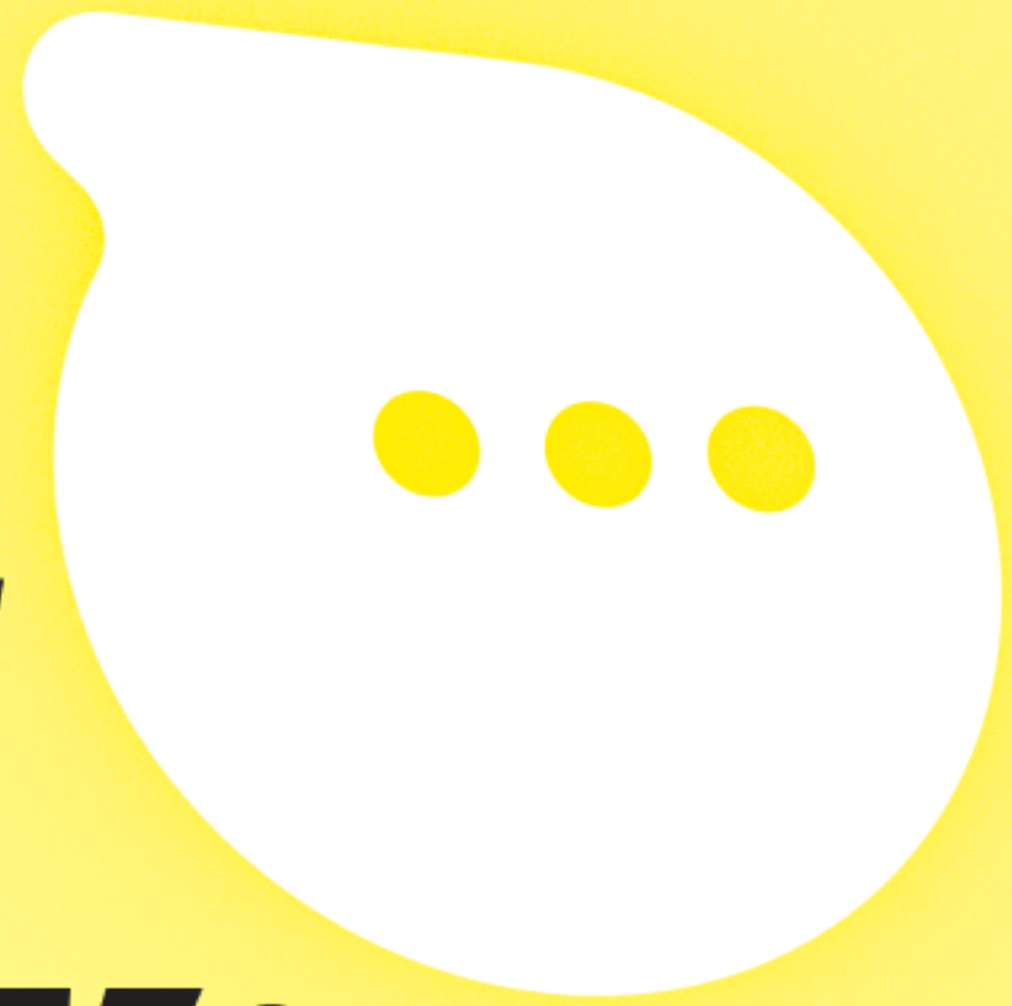
Customer deep-dive:  
**ABOUT YOU**

**.05** page  
.02

**Learn more:** expand your  
WhatsApp knowledge



# ***PROUDLY BROUGHT TO YOU BY:***



*Leading WhatsApp marketing platform  
designed for European consumer brands.  
We **help businesses maximize revenue** with  
WhatsApp, through **analytics-rich software**  
combined with **industry-leading support**.*





# FOREWORD

***When I was eCommerce Lead at McKinsey, it became clear that leading consumer brands were lacking an effective channel to retain customers. At the time, this wasn't a critical issue. Now, though, having a strong retention channel is central to a brand's future.***

As customer acquisition costs rise and purchasing power falls, corporate heads are shifting **focus from acquisition to retention**. With this, CRM functions are becoming more visible and business critical than ever.

I love seeing CRM professionals get the recognition they deserve. But they have challenges too.

**Email engagement is falling and it's not easy to reengage existing customers** through social channels like Facebook and Instagram.

The simple, stickiest solution is messaging apps. Consumers love using them, and their business functionality is now sophisticated. With **over 2.7 billion global users**, WhatsApp is the clear leader – giving brands **instant access to a third of the world's population**.

**60% of people in India** now interact with a business on WhatsApp every week. In Brazil, **79% of WhatsApp users** have interacted with a business there.

We're passionate about bringing this business no-brainer to Europe.

In 2023, we saw a sharp rise in enterprise customers joining us: ABOUT YOU, Jack Wolfskin, Katjes, MediaMarkt and more.

But as yet there isn't a wealth of information about exactly **how WhatsApp marketing can be adopted and scaled in global companies** with complex operations.

With this guide, we **look beyond the hype and share best practices** from our Success team, gathered from close consultations with our customers: some of Europe's leading consumer brands.

No brand wants to risk investing in a fancy but unprofitable marketing toy. Here, you'll find out **how to integrate WhatsApp into your CRM channels efficiently – and make a profit from the start**.

**2024 is set to be a big year for businesses using this messaging app**. We hope we can help you ride the wave and empower your CRM teams to shine and thrive.

**Andreas Tussing**

Founder and Co-CEO

Former McKinsey Associate

Partner (Leader of eCommerce)







***“Mark Zuckerberg says WhatsApp is the 'next chapter' for Meta and could become a bedrock for business messaging”***

BUSINESS  
INSIDER

***November 2023***



# LOVE AT FIRST PING

MediaMarkt

VAT free shopping spree!

Get ready for the sporting event of the year 🏈

We're removing VAT 🇪🇺, so you can grab **super deals** for the Superbowl! 🏈

Shop now and get **1,000 extra points!**

Send STOP to unsubscribe

[GET OFFERS](#)

Katjes



Ok, how many sweets do you think are in the jar?

Send us a **WhatsApp message with the number only** and we'll let you know if you're right.

Good luck! 🍀🍀🍀



🏆 Gewinne 2 VIP-Tickets für das Heimspiel gegen den VFL Wolfsburg am 10.03.2024 in der BayArena 🏆

dermalogica



♥ Unser Gewinnspiel zum Valentinstag ♥

So geht's:

1. Über den Button kommst du zum Gewinnspiel 🏆
2. Fülle das Formular aus, damit wir dich bei Gewinn erreichen können & sag uns, welche Routine Du gewinnen möchtest 🏆
3. Nimm bis 18.02, 23.59 Uhr teil und schon bist Du im Lostopf 🏆

[Zu unseren Angeboten](#)

WORMLAND



Hey Keywan,

You have good taste 🍷

Just a reminder that this 🍷 is waiting for you in your shopping cart.

Sometimes we all need a little time to decide 🍷 so no rush.

Tap this button any time to finish your purchase and try it on IRL

[FINISH CHECKOUT](#)



Here's our **partner look** recommendation for you!

[TO BLACK SWEATSHIRT](#)

Baro



Ciao, la tua spedizione è in viaggio.

Ecco qui i riferimenti con cui potrai seguirla, passo per passo 📦📱📍

[TRACK](#)

Jack Wolfskin

🔥 20 % extra off our Summer Sale, just for members! 🔥

👉 Tap below to become a Jack Wolfskin member, and get **20 % off all reduced items** 🏆

Just use the code **SPECIAL20** while registering 🏆

But don't wait too long, the sale's nearly over!

(Code works online and in-store)

[JETZT ANMELDEN!](#)



charles 🟢

Hey! 🙌 this is how your brand could look in WhatsApp soon.

Abandoned carts, competitions, product tips, all in messages

**First, let's look at the why, the how and the profitability 🏆**

[LET'S](#)

[GO 🙌](#)





***“They have us in their pocket now,  
what could be better?”***



**Louisa Schiminski**  
CRM Manager







## ***If you work in marketing, digital or CRM, it's hard to avoid the buzz around WhatsApp marketing in Europe. But is it ready for enterprise? And are European consumers ready for WhatsApp?***

You probably know about WeChat in China. If you don't: it's the biggest messaging app in the country, **used by up to 80% of the population**. And it's now the standard way that consumers there interact with businesses. You can **browse products, pay for them, get discounts, see live streams and more**, all directly in the app.

It grew because it fed into a consumer need. **Customers want closer connections with the brands they love**. They want easier ways to reach them and buy products. Consumers already used WeChat to message friends, so it was a natural progression to bring businesses in there too.



***“90% of consumers prefer to interact with a brand via text message”***

**Forbes**

It also fed into a business need: it neatly solves the age-old problem of customer retention. Popular messenger apps like WhatsApp are incredibly effective at **catching attention and keeping customers with you in the long term**.

And it's a simple, quick solution. Brands don't need to create their own app, or try to **force better results from email marketing**.

They can just **piggyback onto an app that people already know, love and use every day**.

***WhatsApp users worldwide spend on average 17 hours a month on WhatsApp, or 33.5 minutes per day***  
(Source: **Statista**)



# WHATSAPP: WECHAT FOR EVERYWHERE ELSE

As Meta seeks to monetize its products, it has identified WhatsApp as the big opportunity. **Meta believes business messaging is the future** and is set to make WhatsApp the WeChat for the rest of the world. It launched WhatsApp Business in 2018, initially as a free app for small businesses.

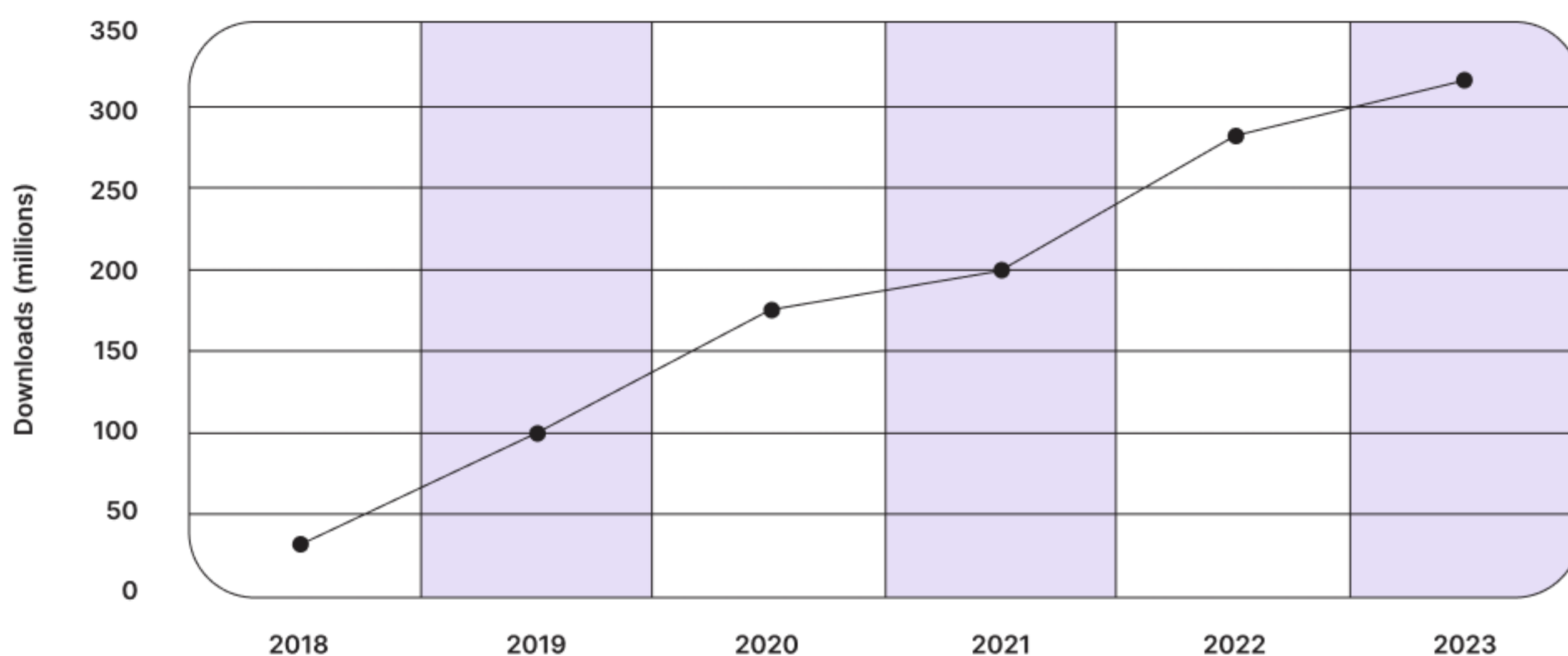
In 2022, it made the **WhatsApp Business API available to larger businesses across the world** – for software providers like us to build an interface on top. Since then, it has partnered with 1,000s of

## WhatsApp Business Solution

**Providers** like charles, and has been steadily expanding its business arm across the world.

In 2023, WhatsApp Business had **200 million monthly active users (MAUs)**, compared to just 50 million in 2020. **Over 175 million people globally use WhatsApp to message businesses every day.**

And this is set to grow. As Meta invests heavily in growing WhatsApp Business, and businesses wake up to its benefits, all graphs are showing lines straight up.



WhatsApp Business app downloads worldwide have risen steadily, tripling in the last few years

(Source: [Statista](#))

European countries with the biggest WhatsApp opportunity for brands are **Germany, Italy, Spain and the UK**. Surprisingly, we see a sudden rise in WhatsApp use in the US in the last year. Traditionally, the US has been SMS-first, but **WhatsApp user numbers increased 9% in 2023.**



# US WHATSAPP DAILY BUSINESS USERS JUMPED BY 80% LAST YEAR

For enterprises, this means that they can start WhatsApp for their European brands and markets now, **make learnings and then expand to the US** later in the year when WhatsApp is more established there.

An interesting result is that European brands may find themselves able to compete better with US brands that are still firmly rooted in SMS. With more experience and bigger user numbers, **European brands experienced in WhatsApp will be better positioned when WhatsApp sweeps the States.**

## WHY DO BUSINESSES NEED ANOTHER CHANNEL?

With so many marketing channels available, **why are brands adding a new one** that's still relatively untested, to their marketing mix?

Simply put, there are **cracks showing in other channels:**

- **Instagram:** increased business adoption and competition is driving up customer acquisition costs (CACs) and making it harder to achieve a return on investment (ROI)
- **Email:** brands still find it useful and it is of course cost effective, but it has an engagement problem – with so much competition and less interest in email communications from consumers, open and click-through rates are low

WhatsApp is a marketing channel that **doesn't overtake existing ones, but complements it.** Brands like this as their other channels – like email – are still relevant. But adding WhatsApp instantly adds more immediacy, personalization and potential for ROI.

# 80%

*of Germans use WhatsApp, making the messenger channel the most popular and most used in this country*





# THE ROI OF WHATSAPP: ONCE QUESTIONED, NOW PROVEN

WhatsApp is an extremely **profitable channel** for brands who take an ROI-first approach.

**Meta charges per conversation** (around €0.07-0.10 in Europe). But we see an **average return of 8-10X in WhatsApp** – far higher than usual returns on ad spend (ROAS) of 2-4X.

*Around 90% of WhatsApp messages are opened, most are read within a few seconds and CTRs are around 20%*

(Source: [5 WhatsApp KPIs you need to know](#))

## WHY IS ROI SO HIGH?

WhatsApp puts brands in a highly visible space: next to friends. **Open rates of 90%**, combined with **short, snappy messages**, lead to high conversion and revenue.

**Interactivity is rich** in WhatsApp, with buttons, lists, videos and more, so engagement is high.

This interaction enables brands to **first qualify customers, and, later, segment them while truly personalizing the message** – leading to more **relevant campaigns and higher conversion**.

**RPC**

=

*average **revenue** generated per WhatsApp **conversation***

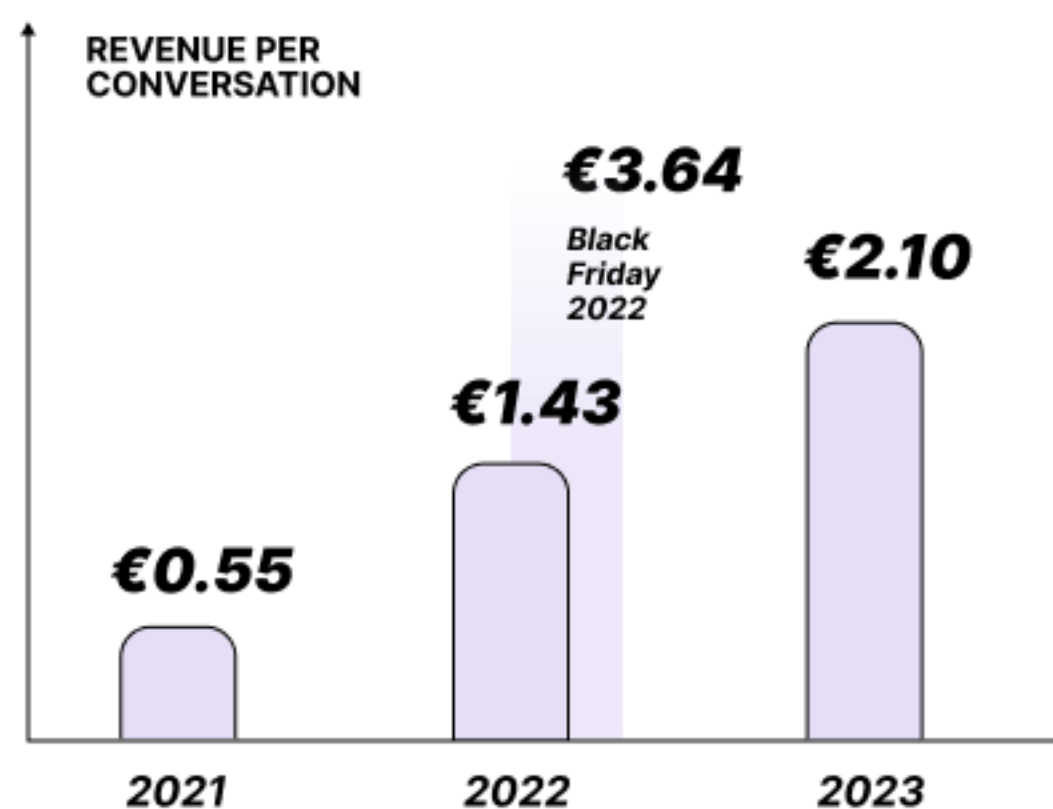
## BUT RPC IS NOT GUARANTEED

Not all brands achieve these levels of success in WhatsApp.

More than other channels, you need to **put profit – and Meta costs – at the heart of your strategy**.

Every conversation counts.

This is why our Success team's **key goal is to ensure a high "revenue per conversation (RPC)"**. For example, our customers **start with marketing, not 1:1 conversations**. They **reduce costs further with automation, segmentation and reengagement strategies**.



*The rising profitability of WhatsApp*  
(Source: [charles](#))

This approach works: our **RPC rose from €0.55 to €2.10 in just 2 years**.

Now, as we're joined by global brands like Estée Lauder, L'Occitane and MG Motor, we see the **size of companies trusting in WhatsApp growing bigger and the numbers ever more impressive**.

**charles**



# 2024: A TIPPING POINT FOR WHATSAPP AND ENTERPRISE

We believe **2024 is going to be the year WhatsApp marketing becomes the norm in Europe**. We see more and more enterprises starting with WhatsApp marketing, at a faster rate, keen not to miss out.

CMOs and CDOs are **shifting ad budgets towards CRM in the face of rising CACs**, declining ROAS and high profitability pressure.

At the same time, current CRM channels are struggling with reach and deliverability – meaning new budgets aren't being used effectively.

The result is that CMOs and CDOs are rethinking the marketing mix and looking for new solutions.

**WhatsApp Business is the right solution, at the right time.**

## HOLDING BACK COULD BE A GREATER RISK

Enterprises are often more risk averse than smaller, disruptor brands. They often wait to see a new channel prove itself before approving their own investment. However, **as with email and social media channels, they often waited too long** and missed out on revenue.

And in fact, **WhatsApp has already been tried and tested by many enterprise brands** – perhaps more than you think. As well as customers **ABOUT YOU**, MediaMarkt, **WWF**, Katjes and others, there are other high-profile WhatsApp users like Netflix, Air France and Hellman's.

*By the end of 2019, we estimate there were just under 1,000 companies using the WhatsApp Business API – 0.05% of the available medium and large enterprises worldwide. Mobilesquared expects this number to rise to 2.5% of the available medium and large enterprises by the end of 2024, representing a total of almost 55,000 organisations, a growth of over 5,500%.*

Mobile Ecosystem Forum

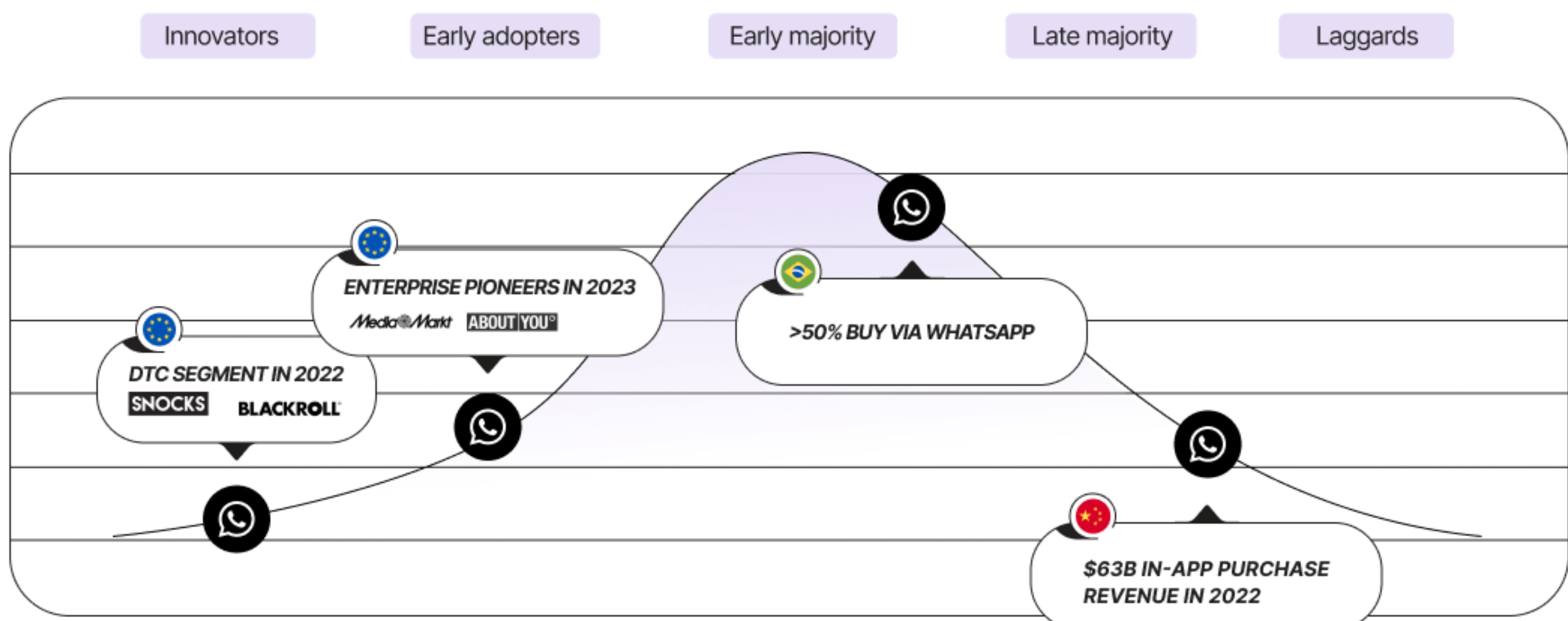
MEF



# TRENDS IN THE ENTERPRISE VIEW OF WHATSAPP

When we talk to enterprise customers now, we see **fewer doubts and more urgency to get started**. Compared to 2022/23, internal stakeholders now feel:

- **Consumers are more willing** to let businesses into their WhatsApp feed as they've seen it either here or abroad (especially in Germany and Italy)
- **WhatsApp software is more mature** and ready for larger companies
- There are now **plenty of numbers and analytics** available to ease the minds of CMOs and CDOs
- WhatsApp is showing it can **solve the retention problem** in a unique and powerful way
- If they don't do WhatsApp now, **their competitors will (or already are)**
- **CRM and marketing teams get a boost** from introducing an innovative new channel (we believe this will be essential for recruiting younger people in future)



*The WhatsApp Business adoption curve. The opportunity for European brands to stand out is huge.*

In the last few years, we talked about WhatsApp as a blue ocean for marketers. Right now, it's easy to catch attention with customers there, because it's a new experience. **This empty ocean is filling up fast** as enterprises realize the benefits of WhatsApp marketing.

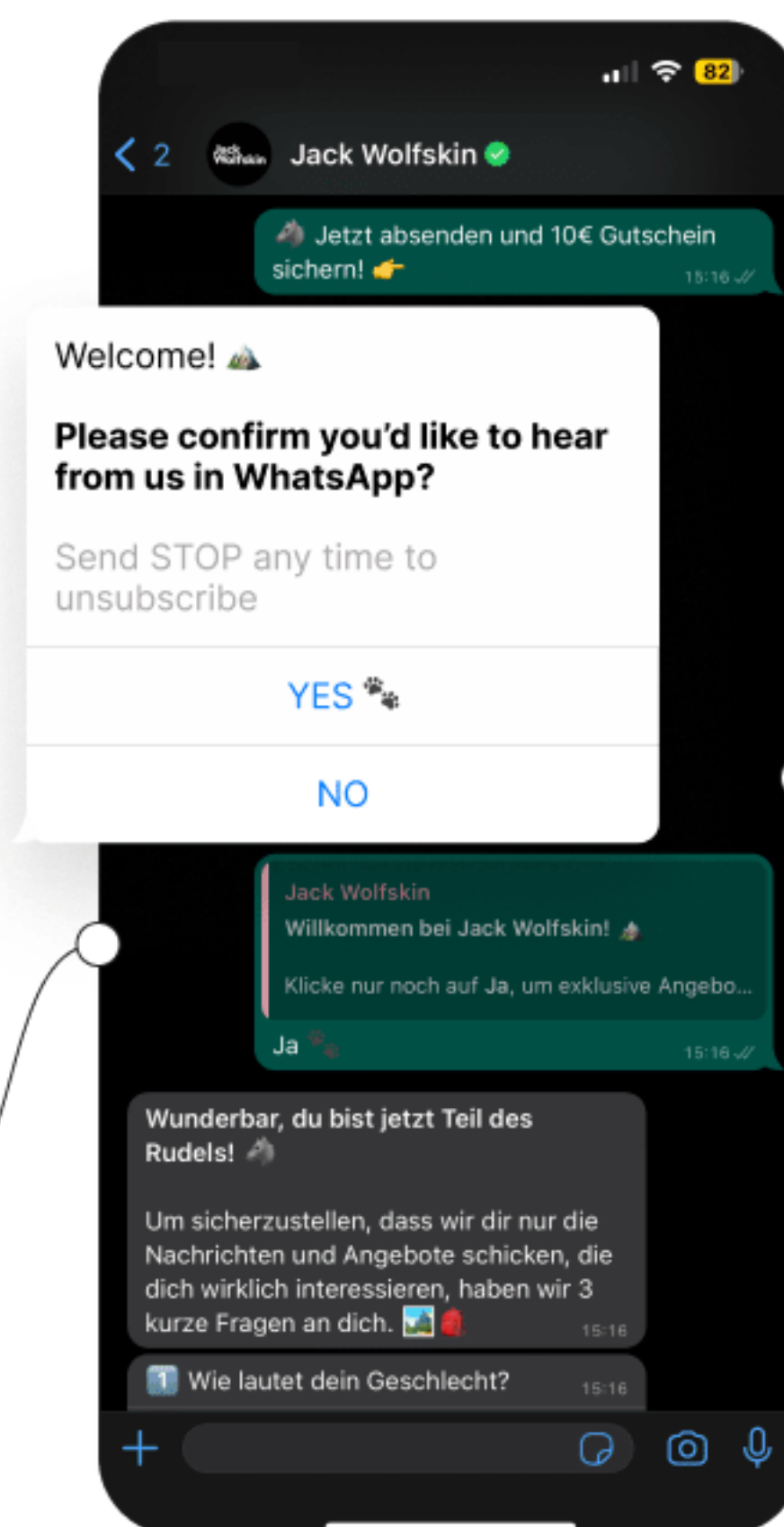
But for now, WhatsApp is still a wide-open space for enterprises wanting to stand out, and **2024 is a critical time** for them to establish themselves there.



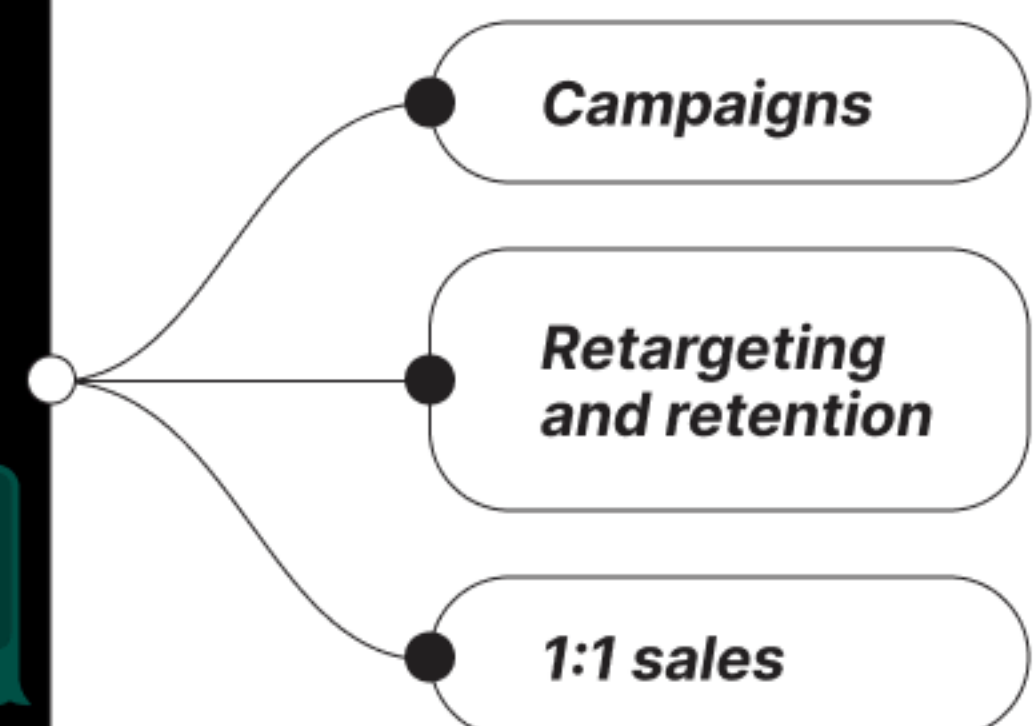
# IT ALL STARTS WITH COLLECTING SUBSCRIBERS



*"Chat-ins" (popups)  
convert **web visitors**  
to subscribers*



*Send an automated,  
GDPR-compliant,  
double opt-in*



*Now grow loyalty and  
revenue: as in email, but  
more interactive and 2-way*







***“We’re excited to be among the first in the market to use WhatsApp in this way”***









***This guide is designed to help you slot WhatsApp into your team and business with minimal effort and risk, and is based on 4 years of experience with over 300 customers.***

*Follow our roadmap to ensure you make the most of data and channels you already have, and get set up for maximum profit.*



# WHATSAPP ENTERPRISE MARKETING ROADMAP

## GETTING STARTED

1. Assign a WhatsApp owner
2. Choose a WhatsApp partner

## ONBOARDING

3. Integrate with tech stack
4. Train your team

## GOAL SETTING

5. Set WhatsApp-specific goals
6. Decide on KPIs

## KICK-OFF

7. Choose first use case
8. Select 1-2 markets/brands
9. Send first campaign

## EXPANSION

10. Scale fast
11. Grow subscribers

## ONGOING PROFITABILITY

12. Create great CX
13. Work on retention
14. Continually optimize
15. Keep costs low
16. Get creative



# GETTING STARTED

## **.01 ASSIGN A WHATSAPP OWNER WITHIN YOUR TEAM**

***Find 1 person and 1 team to lead your WhatsApp marketing efforts.***

Typically this will be a manager within a CRM or email marketing team. This person will be responsible for **goal setting, strategy, KPI reporting, setting up campaigns** and anything around your WhatsApp channel.

Later, you may hire a **dedicated WhatsApp marketing manager**, and share work with a customer service manager as you expand WhatsApp as a support function.

You may find that there are **some people within the marketing team that could add WhatsApp** to the channels they already manage. For example, Dermalogica has employed a community manager to give personalized WhatsApp skincare advice – who also works with live chat and email.

When starting out though, one person, spending **several hours per week on WhatsApp** should be enough – perhaps with the support of a couple of junior team members to set up campaigns and check analytics.



## .02 FIND THE RIGHT WHATSAPP PARTNER

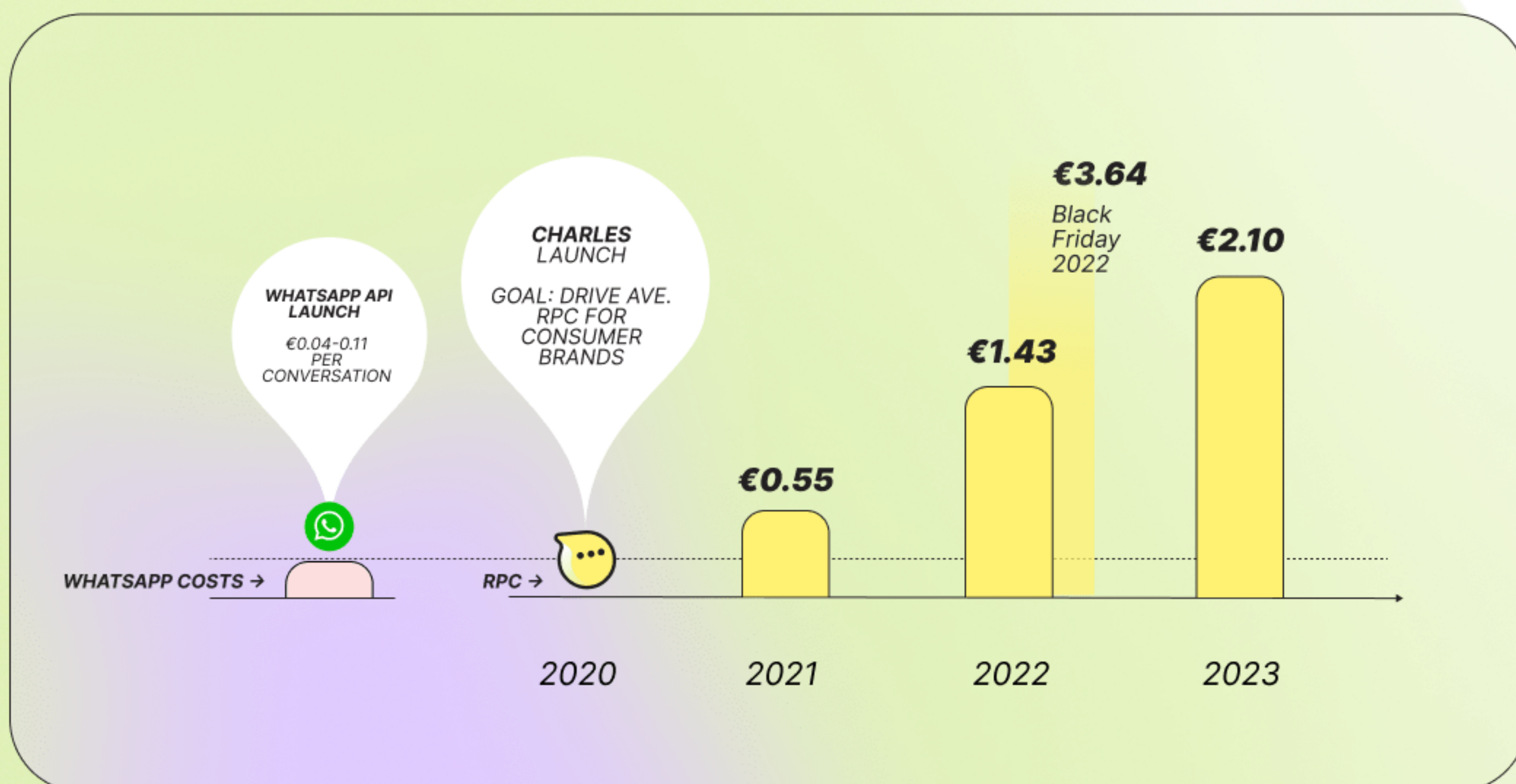
**To start with WhatsApp, you'll need technology – which means partnering with an approved WhatsApp Business Solution Provider like charles.**

The provider you choose will be **critical to your future success**. You'll work with them from the start to devise a solid, low-risk WhatsApp marketing strategy.

Head to the next section to see more about **how to choose the right software partner**.

You can also **choose to partner with a marketing agency first**, who will take some of the load of finding software and managing WhatsApp campaigns away from your team (but of course will add extra expense).

Some agencies, like our partner **chatmarks**, specialize in WhatsApp.



Your partner should be laser-focused on increasing profitability and minimizing WhatsApp costs. Our core goal is to increase our customers' average return per conversation (RPC) each year.



# ONBOARDING

## .03 INTEGRATE WITH TECH STACK

WhatsApp works best in combination with your other platforms. **Integrations with your existing tools** are essential for a **cohesive, truly omnichannel marketing mix**, and to make the most of the data you already have.

For example, you'll need to make sure WhatsApp **integrates with CRM tools like Klaviyo** as well as other messengers.

In particular, email integration with WhatsApp is crucial for your success. **WhatsApp should (and can) complement email, not cannibalize it.**

For the best customer experience, you'll need to **stitch together customer data** from each channel and avoid sending people the same message twice in different channels.

This way, you'll end up with a natural flow between **email and WhatsApp**. You'll find yourself using each channel for different purposes. For example, **abandoned cart reminders and delivery updates work well in WhatsApp**. Email is useful for longer content like product descriptions and to showcase new collections.

For enterprises, custom integrations are often the norm. With the right partner and a mature software solution, this **should be simple and smooth.**



● **CRM TOOLS**

● **MESSENGER APPS**

● **COMMERCE/SHOP SYSTEMS**

● **CUSTOM INTEGRATIONS**



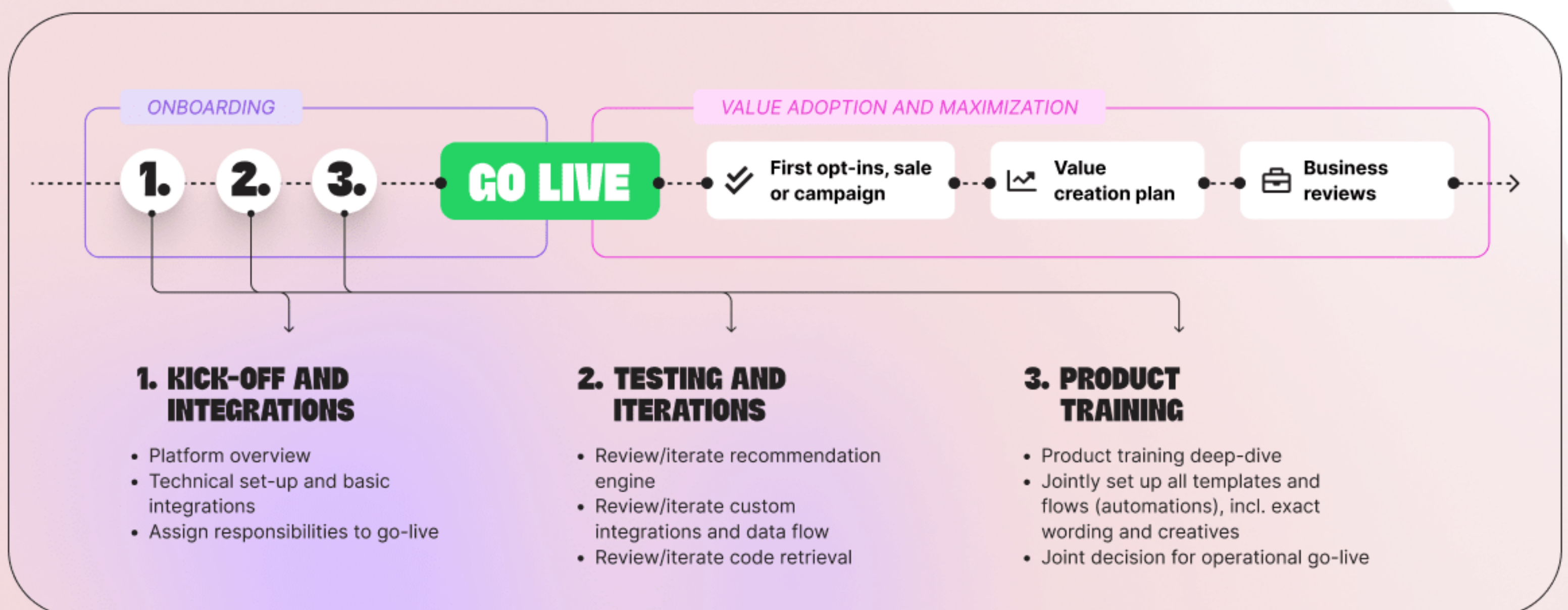
## .04 TRAIN YOUR TEAM

**The work you put in at the beginning to educate you team will be worth it in your revenue results.**

Make sure your team is up to speed on:

- WhatsApp **marketing best practices**
- How to create a **WhatsApp CRM strategy** (that complements other channels)
- Your **GDPR responsibilities** in WhatsApp
- **WhatsApp metrics**
- **Costs of WhatsApp** and how to minimize them

Thorough training up front will help you keep costs down, keep your customers happy and ensure profits rise continually. **Your software partner or agency should help you with this.** They will have all the experience and numbers at their fingertips for you to learn from.



*This is our typical rollout schedule (including training) for our customers*



# GOAL SETTING

## .05 SET WHATSAPP-SPECIFIC GOALS

**Work out what you want to achieve with your WhatsApp channel.**

Business goals typically fall into 2 categories:

1. Revenue generation
2. Brand building

Most of our customers aim to generate revenue with WhatsApp before moving into brand building goals, since **profitability is so important in this channel**. Your WhatsApp aims should of course align with your wider business goals, whether that's to improve customer retention, reach a younger audience, expand into more countries, offer personalized support or simply to boost sales.

Here's an idea of the kind of WhatsApp campaigns and metrics you can expect to be working with according to your business goals:

GOAL	REVENUE GENERATION	BRAND BUILDING
Objectives	Push products, reactivate customers, reward VIPs	Learn more about customers, build trust, boost engagement
Types of WhatsApp campaigns	Discounts, offers, exclusive early access campaigns, let customers create a WhatsApp wishlist and send discounts on Black Friday	Informational campaign, "Black Friday blackout," event, quiz, competition, product finder, product consultant
Metrics	Purchases, total revenue, return on campaign spend (ROCS)	Clicks, website visits over time – but results are not always tangible



## **.06 DEFINE KPIS**

***To be profitable, you need to keep an eye on your KPIs from the start.***

The **top 5 WhatsApp KPIs** used by our customers are:

***RPC***

Revenue per conversation

Benchmark: €1.5-2

***OPEN RATE***

Benchmark:

85-95%

***ROCS***

Return on campaign spend

Benchmark: 8-10X

***OPT-OUT RATE***

Benchmark:

0.3-0.6%

***CTR***

Click-through rate

Benchmark: 15-20%

Work closely with your Customer Success Manager from your WhatsApp Business Solution Provider. They will help you identify these from the beginning, **set targets**, share **benchmarks** and show you how to read analytics in your WhatsApp platform.



# KICK-OFF

## **.07 CHOOSE FIRST USE CASE**

***WhatsApp has so many amazing business use cases, but it's best to focus on 1-2 first.***

WhatsApp is great for [product launches](#), [VIP communities](#), [sales events](#), (like [Black Friday](#)), [loyalty programmes](#), [order tracking](#), [guided selling](#) and much more. But we recommend choosing 1 or 2 use cases while you **get to know how WhatsApp works** and how your customers respond to it.

[ABOUT YOU](#), for example, started with a big Black Friday splash before moving on to abandoned cart reminders and other use cases. Dermalogica started with simple marketing campaigns before expanding to **personalized WhatsApp skincare advice**.

Doing it this way also gives you more time to build subscribers so **future actions will be even more profitable**.

## **.08 IDENTIFY 1-2 MARKETS/BRANDS**

***It's tempting to roll WhatsApp globally straight away, but until you've tested WhatsApp, stick with 1-2 countries or brands.***

Every country needs a different approach. Our enterprise customers have had the **most success when they focus on 1 market or brand** to start with before rolling out globally.

For example, supplements brand Bears with Benefits started in Italy to test the market. Once it had made **€100,000 in 3 months**, as well as many learnings, it rolled WhatsApp out quickly to France, Spain and Germany, with even greater success. [See the full case study here](#).



## .09 SEND FIRST CAMPAIGNS

**Now it's time to send your first WhatsApp babies out into the world 😊**  
**Here's an example process to give you an idea of how it works (hint: it's not that different from email – apart from being easier).**

Here are the steps:

### PLAN

Get your CRM team together to plan a creative concept. Often, campaigns are tied in with **seasonal sales events** like **Black Friday** and **Valentine's Day**. Or expand a campaign your brand is already doing on social media or out of home (OOH). Proper planning not only reduces your work and gives you peace of mind, it also **makes sure you don't send customers too many messages**.

Our customers plan as much as a year ahead for seasonal events like Black Friday.

### SEGMENT

A huge benefit of WhatsApp is the ability to be **highly relevant to many small groups** of people at the same time. Put together lists of audiences you want to send your message(s) to in your WhatsApp platform. Then personalize your messages to show you know your customers and are only dropping in to their WhatsApp feed with **truly interesting, relevant content**.

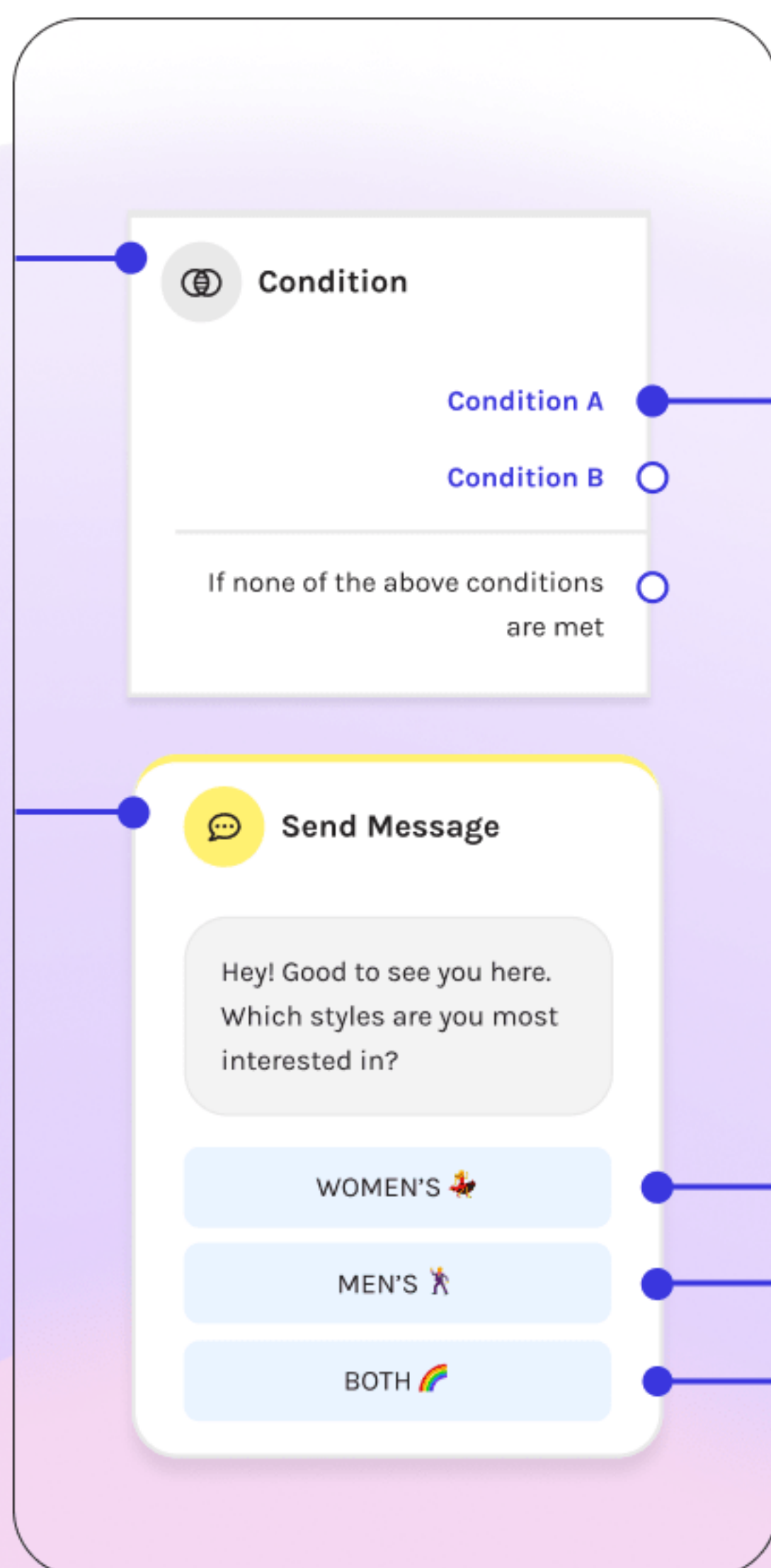
The screenshot shows a segmentation tool interface. At the top, it says "All of the following conditions are true:". Below this, there is a "Condition group" section. Inside this group, there are two conditions connected by an "AND" operator. The first condition is "Opt-in" with a dropdown menu showing "Opt-in as last activity". The second condition is "Properties" with a dropdown menu showing "total order count" and a comparison operator "is greater than" followed by the value "2". There are also buttons for "+ Condition" and "+ Condition group" at the bottom.

*Use segmentation tools to narrow down your audience (saving on Meta costs) and ensure you have the right permissions*



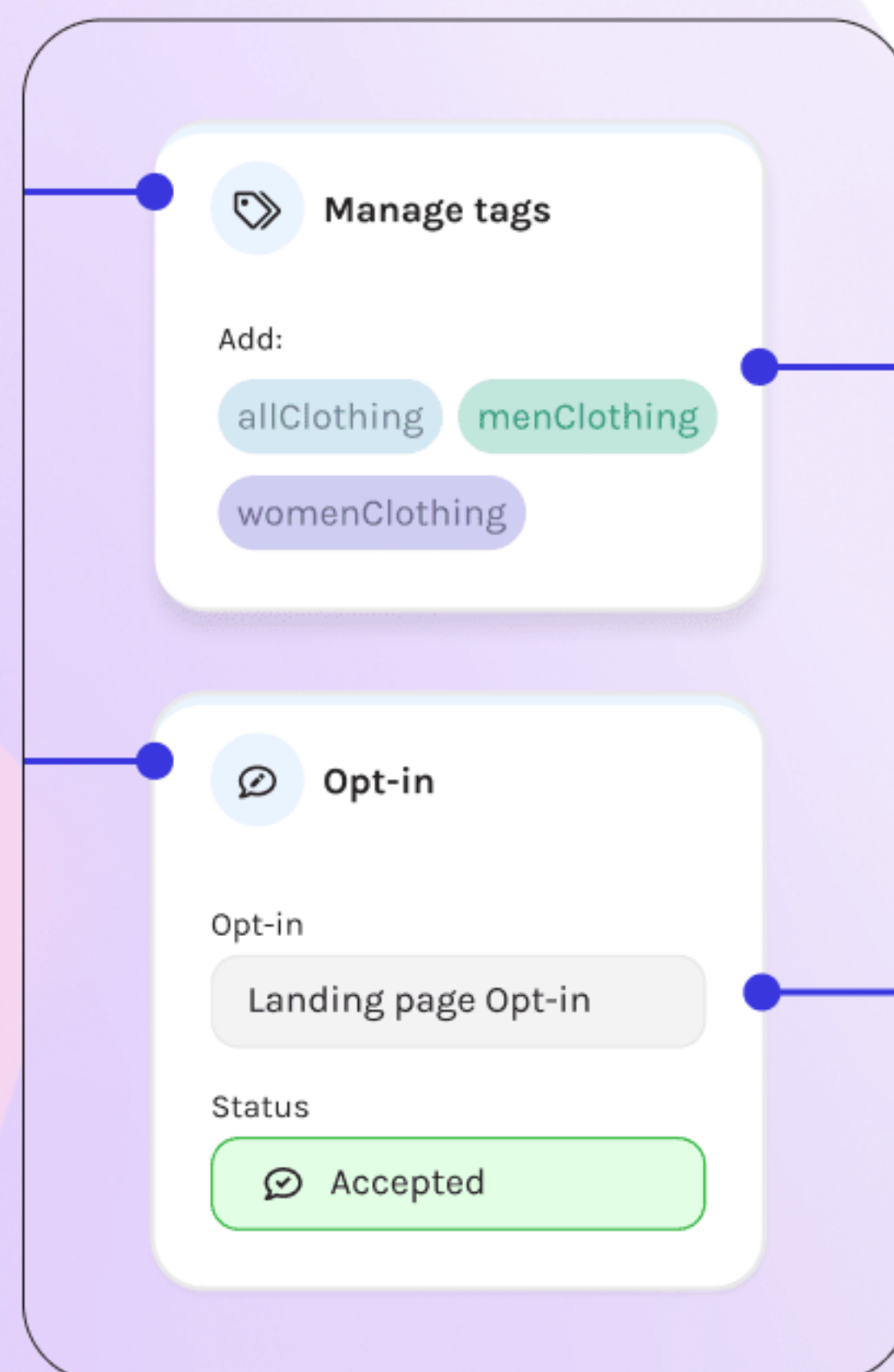
## CREATE

Add your WhatsApp message text with image or video (if using).



*Opt-in flows are a good time to learn about customer preferences*

If it will be a longer flow, you'll set this up in your automation tool (**in charles, this is called Journeys**), with **buttons, lists, condition nodes** and whatever else you want to add. You can add personalization at this point, showing you know a customer's previous purchases and/or color preferences for example. You can also set up your flow to **store customer responses as tags** (if creating interactive campaigns) and learn more about them.





## SEND

Hit send and watch the results come in. Our customers' CRM teams love watching revenue numbers rise, live and say it's like watching TV 📺



**MediaMarkt**  
**92% open rate**  
**€2.31 RPC**

*One of MediaMarkt's first WhatsApp campaigns, achieving some great results*

## ANALYZE

Treat every campaign as a learning experience. Report back on analytics like **RPC, total revenue, open rates and click-through rates**, look at customer responses and unsubscribes. Then continually make adjustments for the next campaign. You can also do **A/B testing** to gain more certainty about what does and doesn't work.



*Be obsessed with WhatsApp analytics – it's the best way to learn and improve*



# EXPANSION

## .10 SCALE FAST

**While we advocate for a manageable, low-key start into WhatsApp, we advise enterprises to scale fast to make the most of WhatsApp as soon as possible**

Once a WhatsApp is proven and learnings made, it's best to **expand into other countries and use cases quickly**.

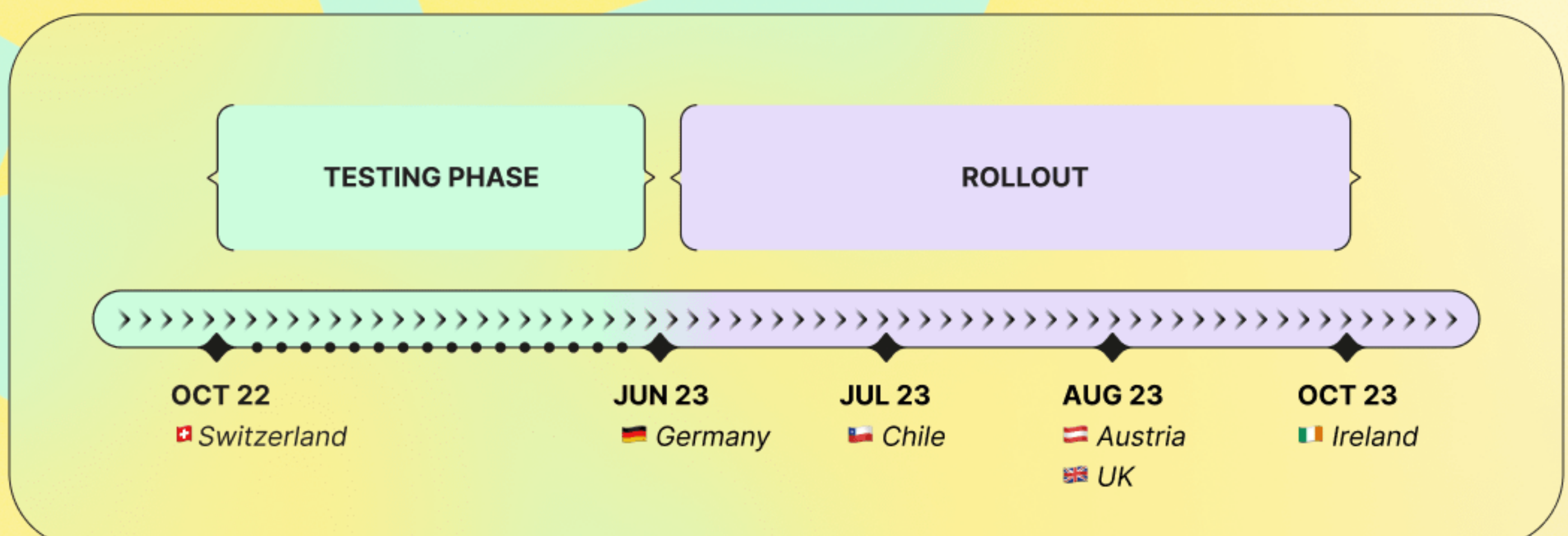
Your team is now trained, your customers are ready, and you've learned how to maximize profitability in WhatsApp. All that's left is to **let more of your loyal fans enjoy the benefits** of connecting with your business on WhatsApp – while you enjoy the revenue it brings.

**Speed is important in 2024.** As more brands jump into WhatsApp, you need to show you're keeping up. **Use this window to stand out from your competitors** and build a subscriber base before they do.



### **A WhatsApp expansion timeline**

After several months of testing WhatsApp with Charles, Emma rolled out quickly to expand WhatsApp to 6 countries within the first year:



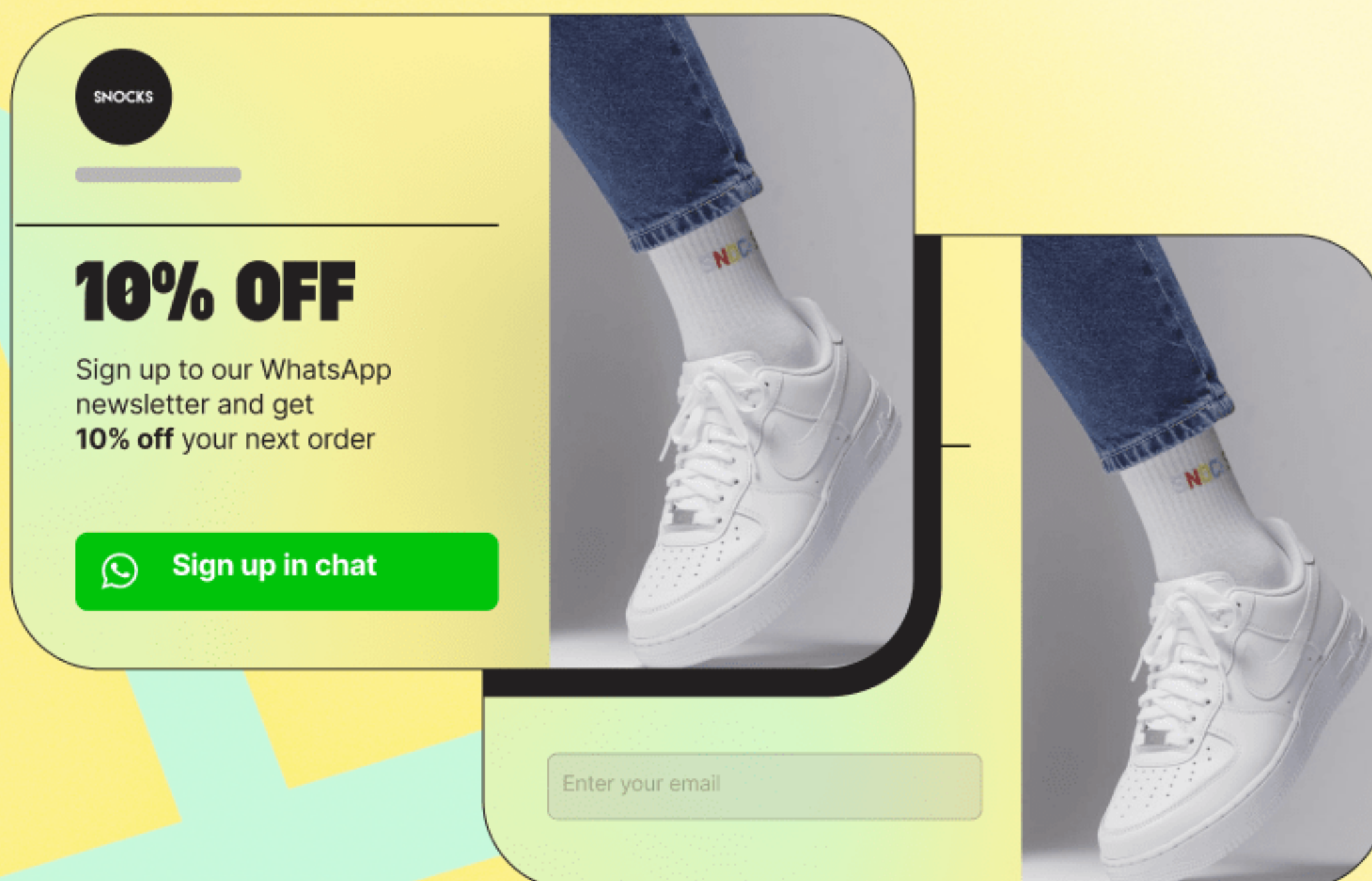


# .11 GROW SUBSCRIBERS

**You need people! Growing your channel is not really a step, it's ongoing.**

Here are some **top-performing ideas to attract 1,000s of subscribers**:

- **Convert email subscribers to WhatsApp**
- Add a **WhatsApp opt-in box** on your thank you page – offering delivery updates, which people generally love getting in WhatsApp
- Put **QR-code posters** up in store offering 10% off when customers join you in WhatsApp
- Add **popups and website banners** leading to WhatsApp – seasonal ones work particularly well
- Link **social posts and stories** to WhatsApp
- **Boost paid ads** and link to WhatsApp (**Ad-to-chat**)
- **Get creative** with competitions, quizzes, games and giveaways to entice people into WhatsApp



*Website popup example from SNOCKS – usually, brands show WhatsApp popups to website visitor on mobile, and email opt-ins on desktop*



# ONGOING PROFITABILITY

## **.12 CREATE A GREAT MULTICHANNEL CUSTOMER EXPERIENCE**

In all this, don't forget the most important element of your WhatsApp strategy: your customers. Make sure their experience in WhatsApp is smooth, personal, on-brand and seamless between channels.

You will make learnings as you send more campaigns about what your customers respond well to in WhatsApp. Here are some things we've learned:

- **Unsubscribe rates are a good indicator of how customers feel** about interacting you in WhatsApp. Unsubscribes tend to be lower than email, at 0.3-0.6%.
- **A cadence that works well is 2 campaigns per month.** More than that (aside from service conversations, tracking updates or other useful messages) is too many. VIP customers for example may tolerate a greater amount of messages.
- **Don't send the same message in email and WhatsApp.** CRM integration and data stitching is key for this. An example: send the first marketing campaign via email (to save costs) and then a WhatsApp only to those who didn't open the email.
- **Always reply to WhatsApp messages.** The volume of replies from automated campaigns won't be huge, but have extra people on hand when a campaign goes out to respond. This is a chance to create real connections.
- **Know your customers.** The more relevant your messages to their needs and previous purchasing behavior the better. This means collecting and using data.
- **Train WhatsApp agents on your brand's tone of voice** – add a WhatsApp section to your brand guidelines (tone, wording, emoji use...) to help consistency.

Consumers like staying connected to their favorite brands in WhatsApp. Get the customer experience right and **your loyal customers will become even more loyal.**



## .13 CONTINUALLY OPTIMIZE

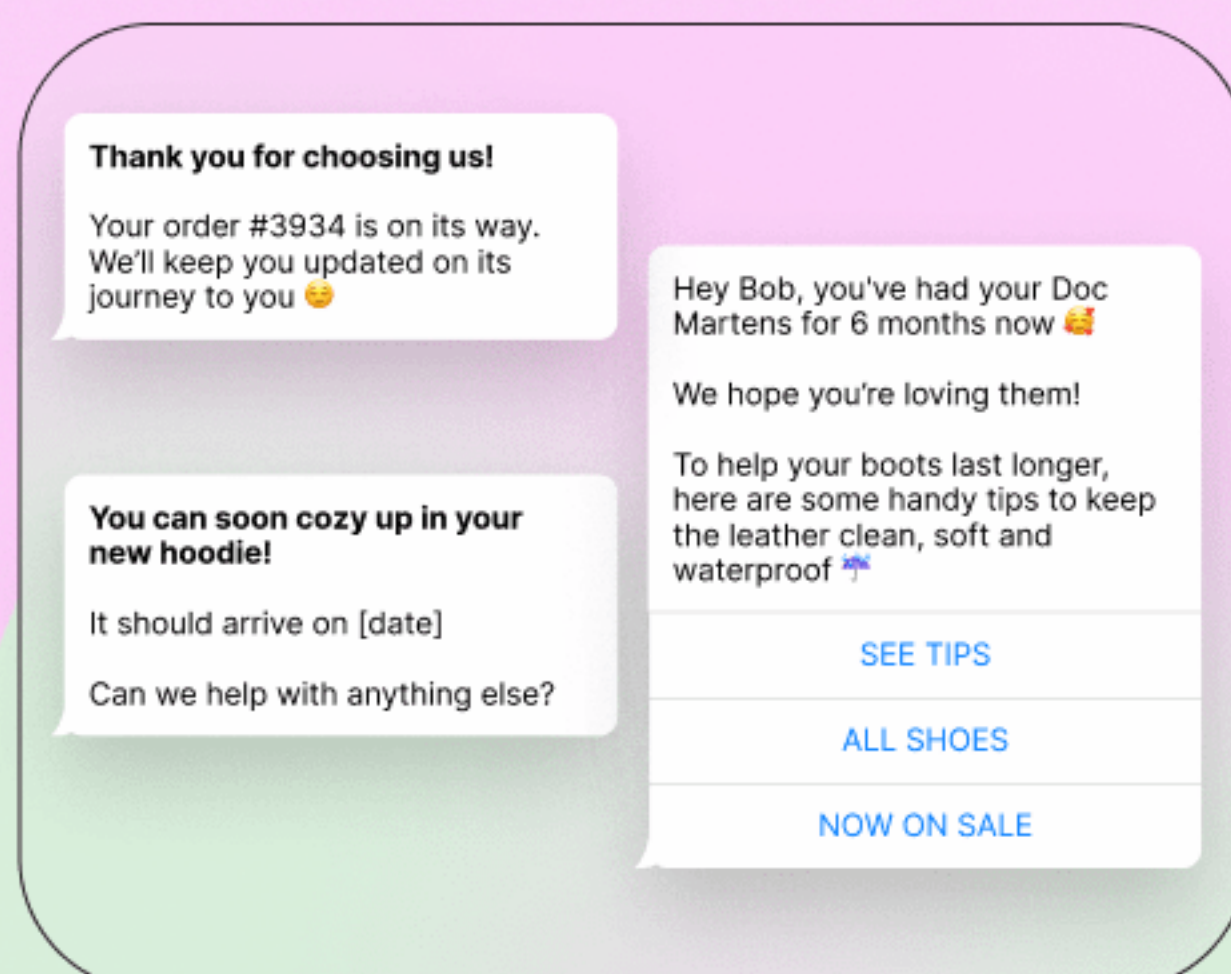
***In WhatsApp, you'll always be learning. Use these learnings to continually boost revenue and retention.***

WhatsApp often rolls out new features for businesses – like in-app payments and business directories. Stay on top of these (your WhatsApp partner will help with this).

A/B testing will be a key part of this. We've seen this **work particularly well for Black Friday and Cyber Monday**. Often, our customers make learnings from Black Friday campaigns and adjust their campaigns over the weekend so that Cyber Monday is even more successful.

Another way to continually improve is to **listen to your customers**. Find a way to collect feedback and incorporate it back into your WhatsApp channel.

## .14 WORK ON RETENTION



Keeping customers is one of WhatsApp's biggest strengths. **It's very sticky.** And with more eyes on retention revenue, you may find WhatsApp comes under closer scrutiny in future – and could even be central to enterprise brands' global strategies.

👉 Here are some **ways to keep people engaged in WhatsApp that aren't discounts**: order confirmations, delivery updates, product tips, exclusive products, replenishment reminders, birthday wishes.



## **.15 KEEP COSTS LOW**

**WhatsApp can be run incredibly efficiently. And of course, the less resource the higher the profit – especially considering Meta charges a fee per conversation.**

One of our customers, a company founder says, even though WhatsApp is a key revenue channel for the company, he spends just **1-2 hours a month managing WhatsApp**.

Typically, we see the **CRM or email marketing manager take on responsibility for overseeing WhatsApp**, strategizing and reporting to leadership. More junior members of the team tend to get involved with writing campaigns, setting them up in the WhatsApp platform and noting down analytics – in combination with email and other channels.

Done right, **WhatsApp should fit in easily with other channels** and tasks.

As your WhatsApp channel grows, it's possible you'll want to hire a dedicated WhatsApp marketing manager like **fashion brand SNOCKS** did (we believe they were the first in Europe to do so 😊).

### **7 TIPS TO SAVE WHATSAPP COSTS**

- 1. Minimize outbound campaigns (1-2 per month)**
- 2. Stay relevant to customers using data and personalization**
- 3. Add extra questions/content on to campaigns to learn about customers**
- 4. Use your 1,000 free Service conversations per month**
- 5. Use Click-to-chat ads (these conversations are free)**
- 6. Finish conversations within the 24-hour window**
- 7. Test to improve profitability of campaigns**

**See more on the blog >**



## **.16 GET CREATIVE**

**WhatsApp is a highly interactive channel and there are so many ways to get creative. This opportunity is still quite untapped and yet can help build your channel fast and get high engagement. Plus it's fun 🌈**

Creative ideas will become more important in WhatsApp. As more businesses enter this space, you'll be looking for **ways to stand out and maintain engagement**.

One of our specialties at charles is creative WhatsApp campaigns, through our in-house agency, Studios. Here are some approaches we often use for our customers:

- 🎮 Interactive games
- 🦊 Personify character/animal
- 🎨 Expand existing brand campaigns
- 🏆 Quizzes, riddles and competitions
- 🔥 Feedback and requests customer photos/videos

You should also **speak to your creative/advertising agency** about adding a WhatsApp element to campaigns, or creating WhatsApp-only campaigns.

Your creatives will be happy to get their hands on the latest WhatsApp technology and add unique, standout ideas to their portfolio.

Or ask your software provider:



# 2 CREATIVE CAMPAIGNS

*Here are 2 WhatsApp campaigns made by charles' in-house agency, Studios, that show how exciting WhatsApp can be.*

## Katjes®

*"Schätz dich glücklich"  
(Guess yourself lucky)*

A simple but creative mechanism to build WhatsApp subscribers fast. We posted sweet jars on Instagram and on a dedicated landing page: [schaetzdichgluecklich.de](https://schaetzdichgluecklich.de). Players had to **guess the number of sweets in the jar** for the chance to win an iPad. They scanned a code or tapped a link to open the Katjes WhatsApp profile. They then **sent Katjes their guess in WhatsApp** and were told if they got it right or not. If they invited a friend in WhatsApp, they got another guess.

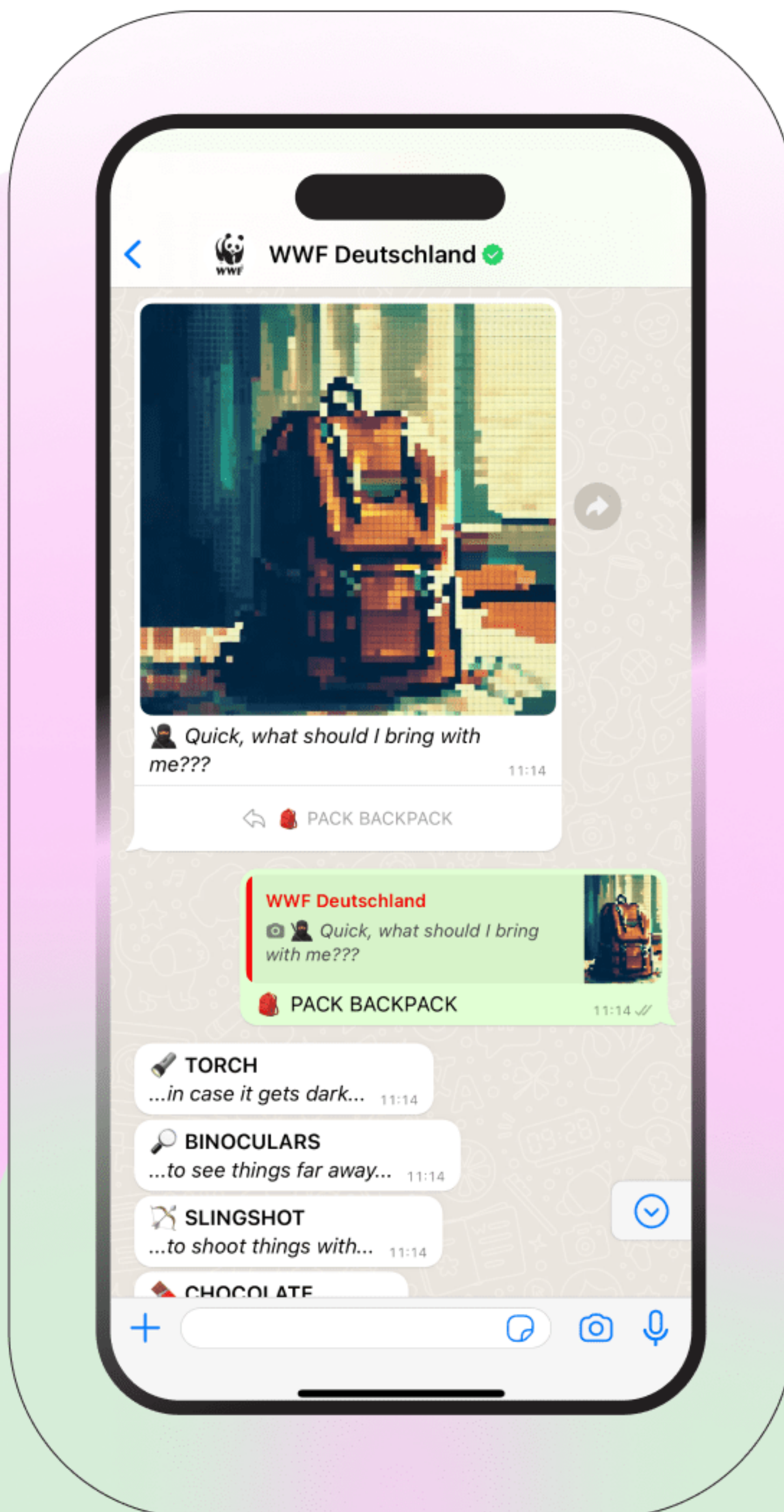
**How many  
sweets in the  
jar?**







**WWF Germany**  
**The Tree of Hope:**  
**a WhatsApp adventure**



We made a WhatsApp game: the biggest automated flow our platform had ever seen. **The Tree of Hope** is a game played entirely with WhatsApp automation, by **tapping buttons, choosing items on lists, entering words and solving puzzles**. It plays out like a retro role-playing game – you are an EcoNinja and you need to save a forest ecosystem, with the help of the Owl of Protection (the owl on the German protected area signs). The game was a huge success, with over **20k players spending an amazing 15-20 minutes playing**, and engaging with the issues facing German forests. You can play it here: [treeofhope.world](https://treeofhope.world) or by scanning the code below:

***“WhatsApp is the most popular messaging app in Germany, and puts WWF in a space people actually are”***



**Karl Nowak**  
*Senior Business Development  
and Digital Strategy*







***“I’ve been working in CRM for 15 years  
and WhatsApp is the most exciting  
development I’ve seen.”***



**Annika Himborn**  
Director of Commercial Success





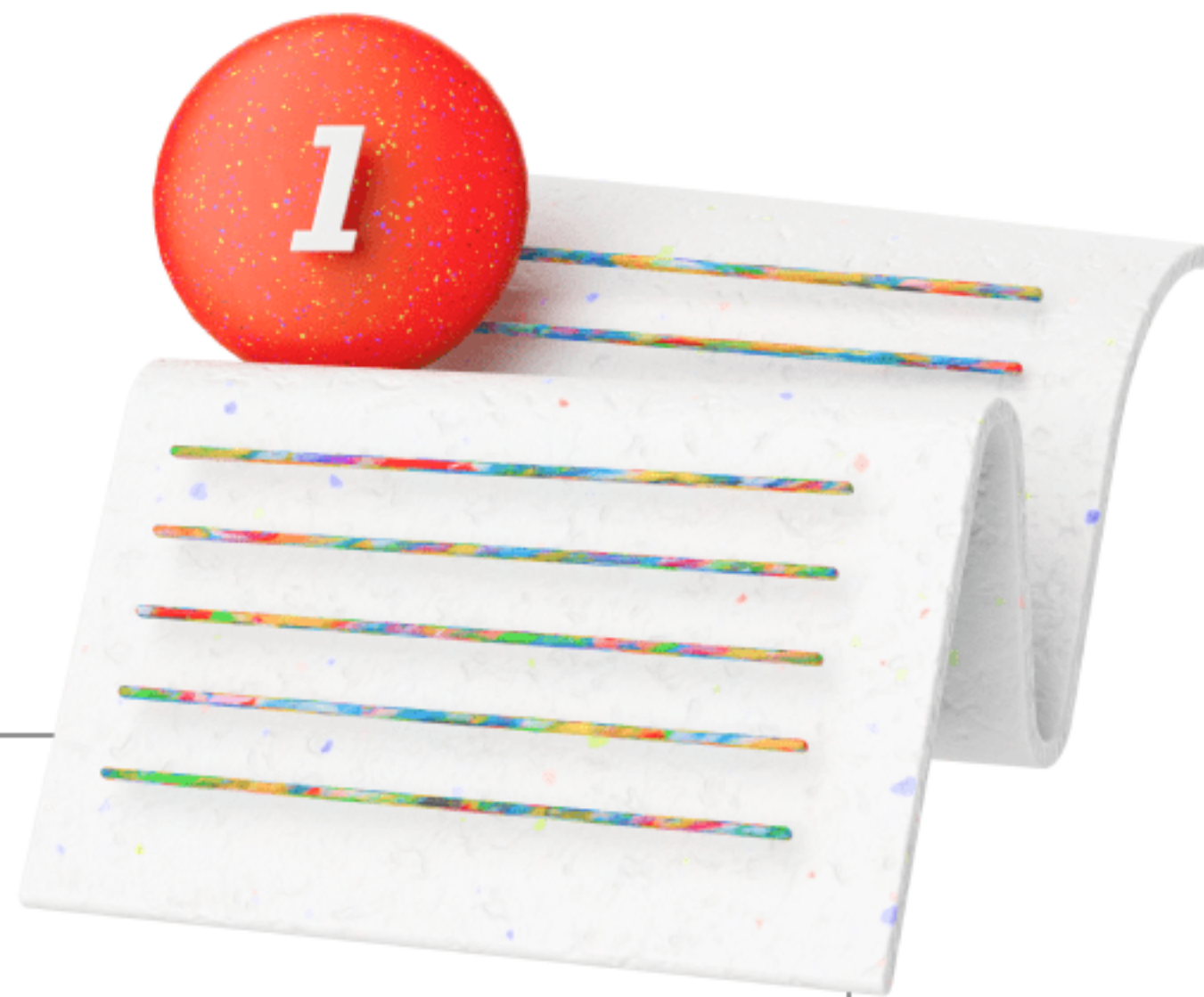
# **HOW TO CHOOSE A WHATSAPP MARKETING PLATFORM**



**To use the WhatsApp Business API, you need a software partner. WhatsApp created the technology but not the user interface. This is why we exist 😎**

Before you start Googling, here are some factors to keep in mind when searching for a **WhatsApp Business Solution Provider** for your business. If you remember one thing, it's: find a partner you trust and enjoy working with, and who will be **more than just a tech provider, but a WhatsApp consultant** who will help you maximize profit in the long-term. **More on the next pages** ➡

# **WHATSAPP PARTNER CHECKLIST**



## **PROVIDER**

- ✓ Strong focus on **revenue generation**
- ✓ Help **minimizing Meta costs**
- ✓ **Assistance with GDPR compliance**
- ✓ **Excellent support**
- ✓ **Official Meta Partner**
- ✓ **Established reputation**

## **SOFTWARE**

- ✓ Advanced **automation**
- ✓ Fine **segmentation**
- ✓ Rich **analytics**
- ✓ Multiple ways to **grow WhatsApp subscribers**
- ✓ CRM and commerce **integrations**
- ✓ **Adaptable** to your needs



# ***YOUR WHATSAPP SOLUTION PROVIDER SHOULD OFFER***







## **FOCUS ON REVENUE GENERATION**

After 4 years doing WhatsApp marketing for our customers, we've learned:

*The key to ensuring success in WhatsApp is to make ROI your number 1 priority.*

Maximizing profitability should lie at the heart of not just your strategy but your software. Your analytics should be visible, and your success manager should be constantly suggesting ways to boost your return on campaigns.

Choose a provider that prioritizes your profit over softer KPIs. A good sign is if the **provider leads with the marketing use case over the service use case.**

Generally, the marketing use case produces better WhatsApp sales outcomes and is more efficient to run than the service use case, which should come later on down the line.



## **HELP MINIMIZING META COSTS**

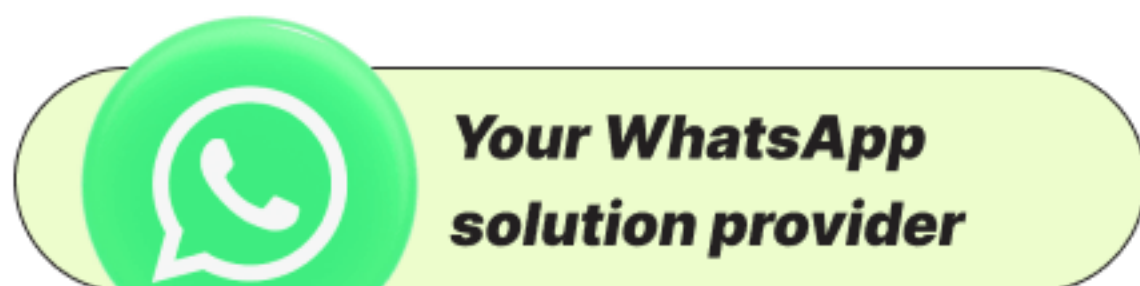
WhatsApp is more expensive than email. Meta charges around 10c per conversation you have with a customer. Your provider should help you keep these costs down.

Your provider usually gets a small fee for every conversation you send out, but that doesn't mean they should encourage you to blindly send out WhatsApp campaigns.

A good provider will **suggest ways to cut conversation costs** to keep your ROI high, for example:

- **Finish conversations within the 24-hour window** (after that, you'll be charged for another conversation)
- **Avoid changing the type of conversation in the middle of it** – for example going from a "Marketing" conversation to an "Authentication" conversation – you'll be charged twice
- **Segment finely** and only send targeted, relevant campaigns to interested customers – blanket broadcasts are costly and will cause you to lose customers





## GDPR ASSISTANCE

The General Data Protection Regulation (GDPR) requires EU companies to protect customer information and treat it in the right way. Most brands know how to comply in email communications – but **you need to the same WhatsApp too.**

GDPR is important for enterprises. Although it only applies to the EU, most global brands these days adhere to GDPR they operate – as the gold standard of data privacy.

Some worry that WhatsApp is not GDPR compliant, but this is far from the truth. You just to take steps like:

- **Get a double opt-in** when customers enter your WhatsApp channel
- Let customers **unsubscribe from your communications** – a footer in every message is best
- Let **customers see the data** you hold about them
- **Delete customer data** if they ask
- **Store data securely** (this typically means in EU servers)

Choose a provider that will **help you fulfil requirements and includes GDPR features in the product.**

## EXCELLENT SUPPORT

The support you get from your software partner's Success team is going to make or break your WhatsApp marketing efforts.

As a relatively new marketing channel, you're going to need all the insights you can get.

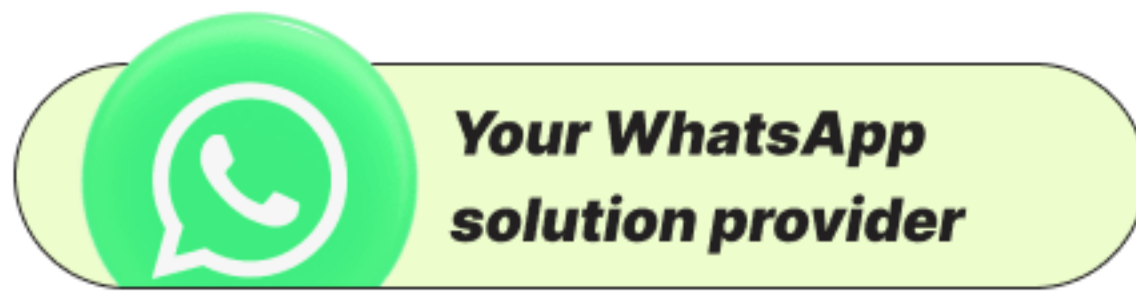
Your software company should offer:

- Excellent **onboarding and training**
- Ongoing **strategy meetings**
- Regular proactive **creative campaign ideas**
- **Knowledge-sharing** from other brands in their portfolio
- Insights into **how to understand analytics**
- Ideas for **optimizing your campaigns** for increased performance
- Space for **your feedback**

Overall, you should get the feeling that your provider **cares about your efficiency, growth and profitability**, and will work tirelessly to help you succeed in WhatsApp.

It's good for us too. Our Success team is central to our... well, success, because brands need some help learning how best to manage a channel like WhatsApp





## **META PARTNER**

When you're entrusting a software company with customer conversations and data, you need to be certain you can trust them.

One way to be sure is to only choose an **Official Meta Partner** and WhatsApp Business Solution Provider (BSP). You'll find all approved WhatsApp providers in the Meta directory ([including charles](#)).

A "Meta Partner" badge is a sign of a reputable company, already vetted by Meta and WhatsApp. It also means they're approved to **use the WhatsApp Business API** and have good connections with WhatsApp should any problems arise.



*Look for this badge*



## **ESTABLISHED REPUTATION**

WhatsApp Business is growing fast in Europe. Many WhatsApp marketing tools are brand new on the market and looking to ride the conversational commerce wave and make fast money – not always in ways that are good for every business.

Make sure you look beyond the sales pitch to real credentials like:

- **How long** has the company existed?
- Who are the **founders**?
- What **customers** does it have?
- Is it **ISO 27001** certified?
- What **reviews** does it have?
- What **other recognition** has it received?

A strong, stable software partner will be sure to **stay with you in the long-term**, **safeguard your data** and have the knowledge and expertise you need to succeed.



# ***YOUR WHATSAPP PLATFORM SHOULD OFFER***



# ADVANCED AUTOMATION

Whereas many providers focus on helping you manage customer service conversations in WhatsApp, a marketing, automation-first WhatsApp model is better for profitability. At least to start with.

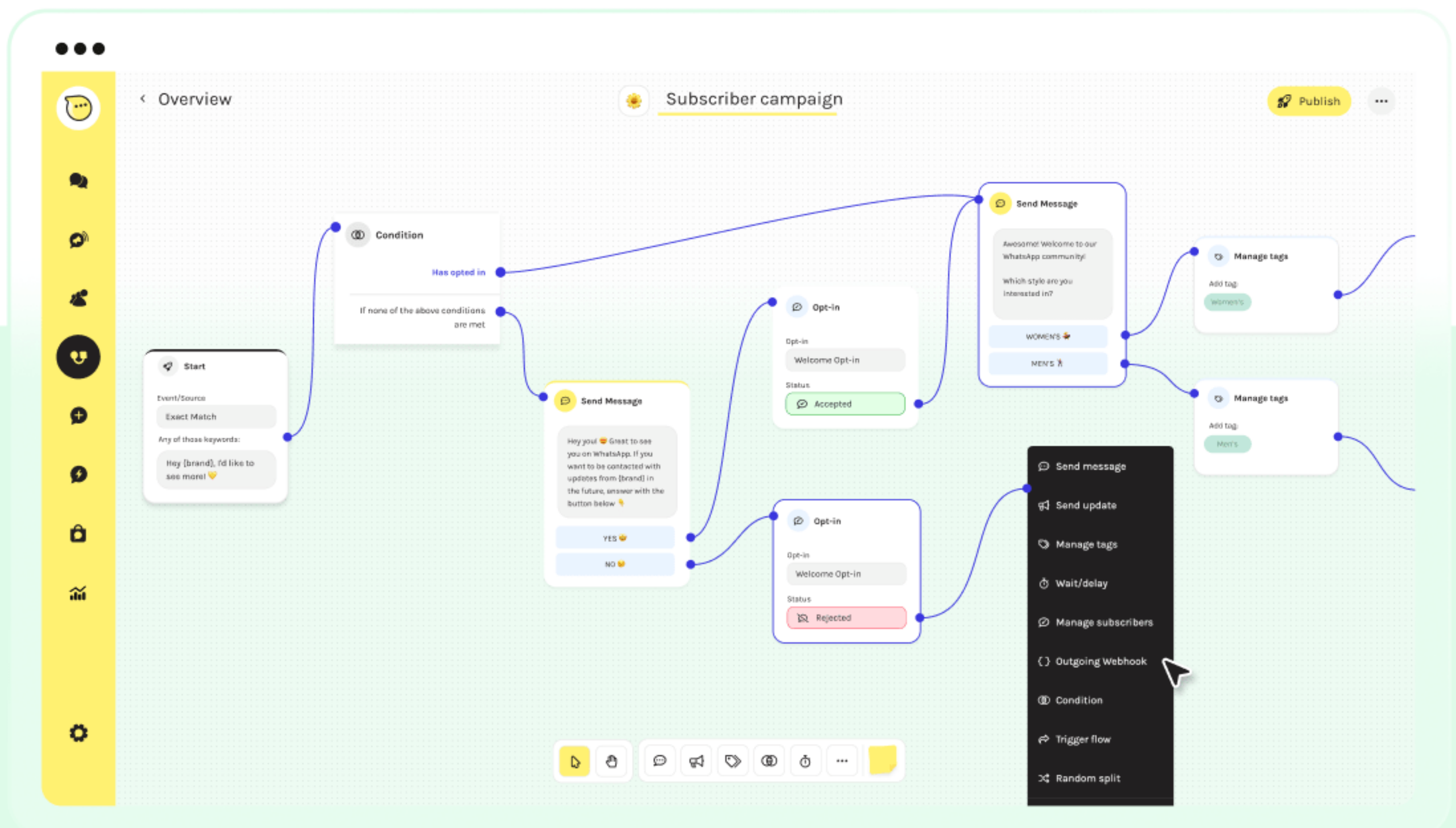
Why?

Because it takes time and budget to answer 1,000s of customer conversations. Automation saves time and effort, ensures brand consistency and provides rich analytics. Also, marketing campaigns generate the most revenue.

We call our automation feature (**Journeys**) the "always-on revenue machine" because it works for you in the background, making sales.

**Examples of flows** you can set up to work for you continuously:

- Automated, interactive **product finders**
- **Order tracking**
- Fully automated **marketing campaigns** like competitions, quizzes, discounts and games
- **Smart opt-in flows** that gather customer preferences – like size, favorite styles and how much they'd like to hear from you in WhatsApp





# GRANULAR SEGMENTATION

In WhatsApp, relevance is key. Customers might put up with generic content in email, but not in WhatsApp. The key to relevance? Personalization and segmentation.

## How to do segmentation?

You need a WhatsApp platform with a tool like "Audience Builder" from charles. This helps you create lists of audiences for each campaign you send out, and only include people who have given you the right permissions.

Within that, you can further personalize, for example with first name, favorite color and pet name.

**Integrations** with your shop system and email CRM are also useful here, so you can import customer information you already have, like **last product bought, email opened and VIP status**.

The higher the relevance, the more likely it is that customers will feel heard, the more likely it is they'll respond to your campaigns – and of course, the higher the performance of your campaign.

The screenshot displays the 'Create a segment' workflow in the Charles Audience Builder. The interface includes a sidebar with navigation icons, a progress bar showing '1 Define conditions' and '2 Review', and a main workspace for defining segment criteria. The segment is named 'Sunny Spring' and currently contains 287 contacts. The conditions are defined using a logical 'AND' structure. The first condition is 'All of the following conditions are true: Contact has clicked campaign at least once in the last 90 days'. The second condition is 'Any of the following conditions are true: Contact's storefront vendor tag is none of SuperImportant, SummerSpecial, Discount\_LoyalClient, Female, or Male'. The interface also includes a '+ Filter' button and a 'See all' link for the resulting audience.

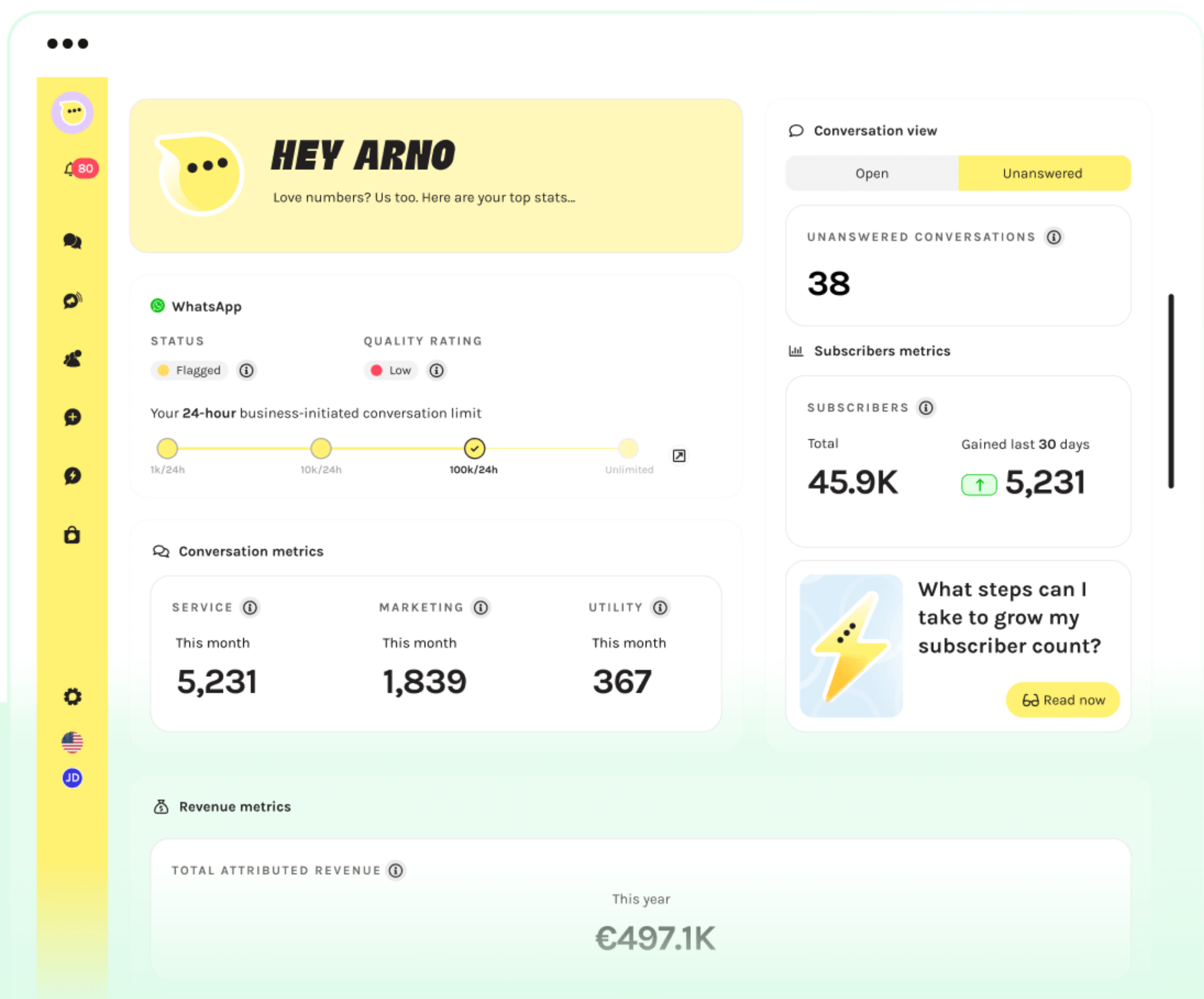


# RICH ANALYTICS

"You can't manage what you can't measure." A common marketing saying, and never more true than in WhatsApp.

Your WhatsApp marketing platform should give you clear visibility of the results of each marketing campaign, including **RPC, ROCS, open rate, click-through rate and total revenue**.

It should also enable A/B testing so you can find out what works for your audience before rolling out your entire campaign.





# MULTIPLE WAYS TO ADD WHATSAPP SUBSCRIBERS

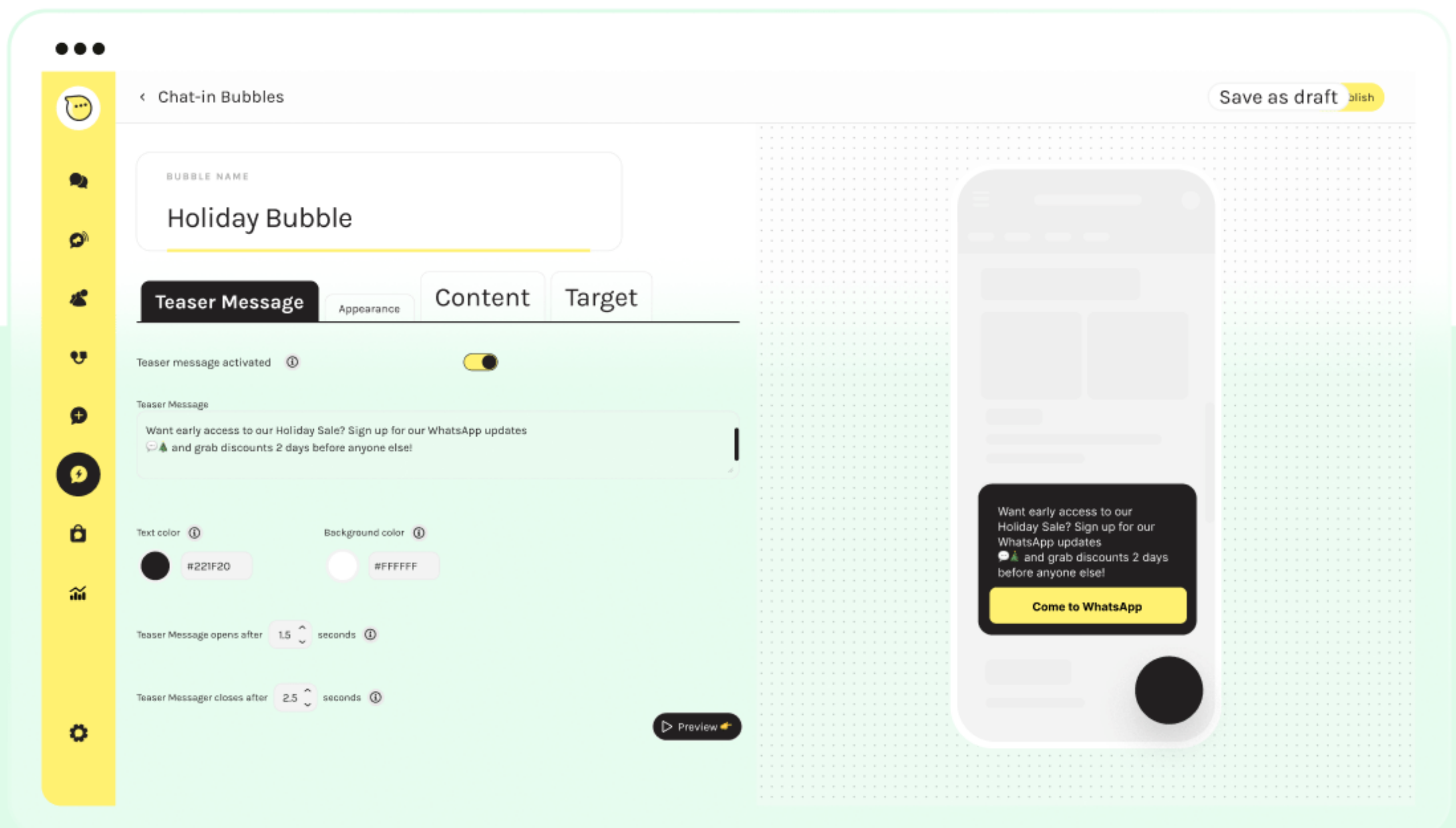
Your WhatsApp marketing channel is never going to gain momentum without subscribers. And to build these numbers, you need various tools at your fingertips.

Your WhatsApp marketing platform should include:

- **Customizable website popups** that bring people into WhatsApp
- **Website bubbles** constantly visible that bring people to WhatsApp
- **Widgets on certain pages**, for example offering order tracking on your thank you page or back-in-stock notifications on out-of-stock product description pages (PDPs)
- The ability to **turn popups on or off** on desktop or mobile – many of our customers drive subscribers to email on desktop and WhatsApp on mobile, for a more intuitive journey
- **Email CRM integration** to help you bring people from email into WhatsApp
- **QR codes** to bring offline customers (in-store, OOH) into WhatsApp

Your partner should also suggest other ways to grow subscribers, like:

- Click-to-chat ads
- Instagram campaigns
- In-store campaigns with QR codes





# SHOP AND CRM INTEGRATIONS

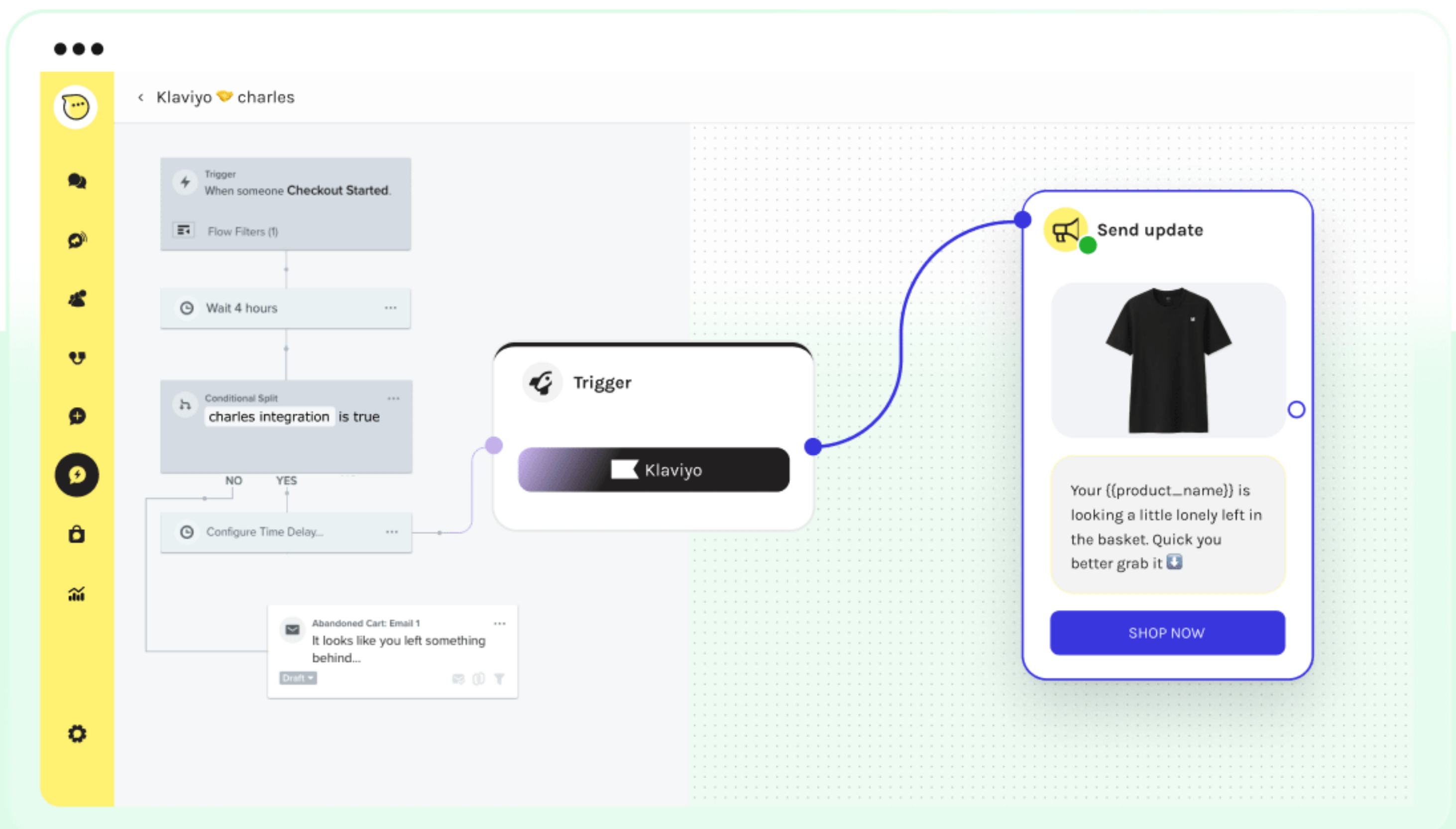
You've worked hard to build your shop system and CRM tools, as well as build your customer database. Make sure you can keep using all this.

Choose a WhatsApp marketing platform that offers **integration with leading commerce and CRM software**, for example [Shopify](#) and [Klaviyo](#).

In charles, with a Shopify integration, you can send "[Chatouts](#)" during a conversation. These are **links to prefilled carts so customers** can buy products in as little as one click (if they're already logged in).

Shop system integration with WhatsApp is essential to collect and use customer data in the right way, and boost sales with more personalized experiences.

The easier you can make the shopping experience, and **the fewer the obstacles between the customer and a sale, the better.**







***“We’re super happy with the technical support and content inspiration the charles customer success team provides”***





# ***CUSTOMER DEEP-DIVE***



# ABOUT YOU<sup>®</sup>

***ABOUT YOU is a German online fashion retailer based in Hamburg. Founded in 2014, it quickly expanded its presence to 24 European countries, and is now a dynamic force in the industry.***

*It's also a charles client* 💕

*ABOUT YOU started its WhatsApp journey with us in **early 2022**.*

*Steffen Sieber, Senior CRM Manager at ABOUT YOU shared valuable insights with us into how WhatsApp works at ABOUT YOU and how to maximize revenue in WhatsApp.*

**ABOUT YOU's** aim is to give customers a direct line to ask questions and get help in real-time. It wants to recreate the cozy feeling of shopping in a store. but online.

The brand had 2 main WhatsApp business objectives:

**1**

**Personalize the customer experience** – by understanding individual needs and having direct 1:1 conversations with customers

**2**

**Enhance customer engagement and rekindle customer interest** – by replacing traditional and crowded email communication channels with a fresh one: WhatsApp





## GETTING STARTED

*This is the process ABOUT YOU took to add WhatsApp to its marketing mix:*

- 1** **Determine the market:** ABOUT YOU conducted thorough market analysis to determine where WhatsApp would best fit into its communication strategy
- 2** **Get a WhatsApp number:** ABOUT YOU obtained a dedicated WhatsApp number with charles
- 3** **Partner with charles:** ABOUT YOU got set up WhatsApp in just 48 hours

## GROWING SUBSCRIBERS

*To get quality opt-ins, ABOUT YOU carried out a series of campaigns:*

- 1** **FOMO campaigns:** driving a sense of urgency and exclusivity. Opt-out rates were low and it was considered a valuable testing phase.
- 2** **Collection drops:** highly targeted campaigns using data from previous "FOMO" campaigns. They didn't just offer discounts but gave exclusive access to new collections.
- 3** **Sale campaigns:** offering early access and promotional codes to WhatsApp subscribers, achieving high conversion rates.
- 4** **Product finder:** directly engaging female customers and seeking their preferences, like choosing between a summer dress or a 2-piece outfit.



## THE WHATSAPP LEARNINGS

The ABOUT YOU CRM team learned to:

- 1** **Use opt-in channels for organic account growth:** this approach not only expands your reach but also ensures that customers willingly engage with your brand.
- 2** **Create exclusivity:** Black Friday is the perfect chance to evoke a sense of exclusivity. Offer early access, exclusive discounts and sneak peeks to make customers feel special and valued.
- 3** **Multi-channel management:** ensure a consistent and cohesive messaging strategy, so customers seamlessly interact with your brand.
- 4** **Personalization and segmentation:** effective segmentation ensures that you don't inundate your customers with irrelevant messages. Tailor your offers to what each customer values most.
- 5** **Reliability and authenticity:** avoid spammy messages and strike a balance between message volume and relevance. Only send messages once or twice a month.
- 6** **Keep it simple:** clarity is key, especially during the busy Black Friday period when customers are bombarded with offers.
- 7** **Test content:** different audience segments may respond differently to your messages. You need to understand your customers' preferences and refine your strategy accordingly.





**LEARN  
MORE**



# WHY ENTERPRISES NEED THE API, NOT THE APP

Let's get back to basics quickly. What's the [difference between the free app and the WhatsApp Business API](#) and why do enterprises need the API? Here's a quick overview.

	WhatsApp Business app	WhatsApp Business Platform (API)
Used by	Small businesses	Medium and large businesses
Cost	Free	Cost per conversation to Meta (1,000/month are free) – there are 4 conversations types with different costs: Authentication, Marketing, Utility and Service
Functionality	Limited: <ul style="list-style-type: none"><li>- Quick replies</li><li>- Catalogue</li><li>- Add labels to contacts</li></ul>	Rich <ul style="list-style-type: none"><li>- Buttons</li><li>- Lists</li><li>- Multimedia attachments</li><li>- Chatbot integration</li><li>- Fine customer segmentation</li><li>- Deep analytics</li><li>- Clickable messages</li><li>- Automation</li></ul>
User interface	Mobile app or web app	None from WhatsApp (brands need software like Charles)
Green verified tick	Not possible	Possible
Buttons	Not possible	Possible
Numbers of users	4	Unlimited chat agents
Business profile	Yes	Yes
Integrations	None	Can integrate with any existing business tools, like messengers, CRM tools like Klaviyo and shop systems like Shopify
Number of messages	Maximum 256 contacts	Unlimited
Automation	Limited to quick replies, greeting/away messages	Many possibilities for fully automated conversational flows with personalization, API integration and more



# HEY! WHAT DO YOU WANNA KNOW MORE ABOUT?



WHAT IS  
**charles**

**ABOUT US**



**WHATSAPP &  
ENTERPRISE**



**TO BLOG**



**WHATSAPP  
REVENUE  
CALCULATOR**



**SHOW ME**



**WHY**  **WHATSAPP**

**LEARN**



**Talk to  
an expert**

**GET A DEMO**





**WANT TO  
CONTINUE THE  
CONVERSATION?**

**JOIN US IN  
WHATSAPP**

