Run Conversational Campaigns for WhatsApp

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CONTENTS

CONVERSATIONAL CAMPAIGNS FOR WHATSAPP

Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.
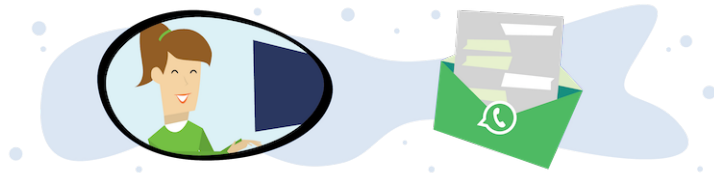
Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

When you link to WhatsApp messages from SMS, you provide customers with assistance that's one click away from the promotion. Your agents can secure sales from customers through personal interaction, while Service Cloud updates customer contacts for future engagement.

The Run Conversational Campaigns for WhatsApp solution kit helps you:

- Include a WhatsApp direct message link as a footer in all promotional SMS messages.
- Store messaging history in Service Cloud.
- Collect more customer data with in-channel Einstein Bots.

Required Products

- Marketing Cloud (Corporate or Enterprise Edition)
- Mobile Activation SKU
- Sales Cloud
- Service Cloud
- Digital Engagement SKU (Excluding Government Cloud)

- Omni-Channel in Lightning Experience

Implement This Solution

Workflow

Learn how data flows through the configurations to run conversational campaigns for WhatsApp.

Configure Conversational Campaigns for WhatsApp

Use these configurations to run conversational campaigns for WhatsApp.

Design Considerations

Keep these design considerations in mind when you run conversational campaigns for WhatsApp.

Customer Opt-In

Conversational campaigns for WhatsApp require different customer opt-in preferences. See opt-in settings for this solution.

Workflow

Learn how data flows through the configurations to run conversational campaigns for WhatsApp.
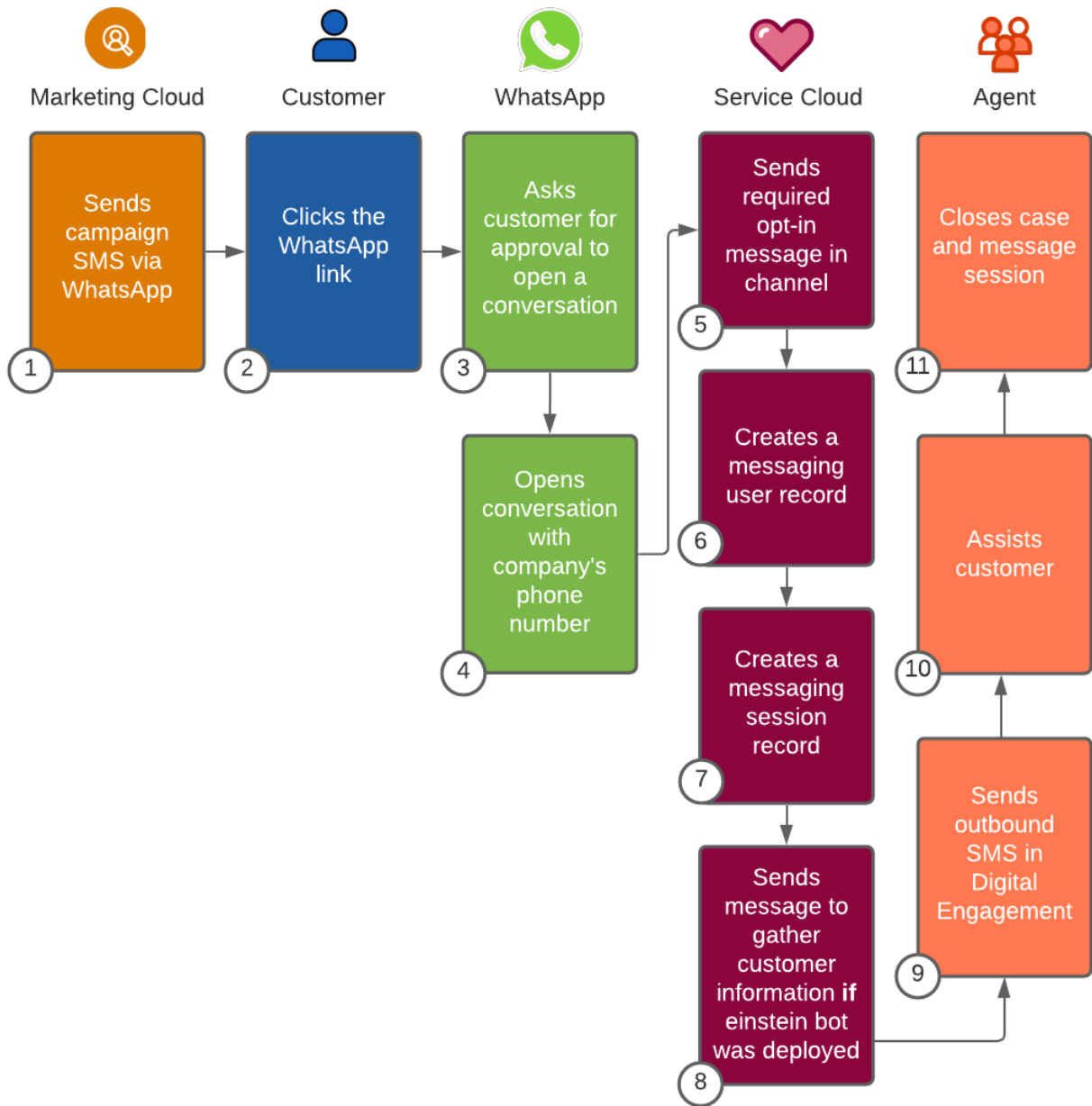
- Marketing Cloud sends a campaign SMS message with a WhatsApp link. (1)
- The customer clicks the WhatsApp link to ask a question. (2)
- WhatsApp asks for customer's approval to open a conversation in the mobile app. (3)
- The customer is brought to WhatsApp's UI and the company's phone number. (4)
- Service Cloud sends the required opt-in message in the channel. (5)
- Service Cloud creates a Messaging User record. Channel-Object Linking matches this record to any existing contact record. (6)
- Service Cloud creates the Messaging Session record. (7)
- If you deployed Einstein bots, they send messages to gather customer information. (8)
- An agent picks up the Messaging Session from the Service Console queue. (9)

- The gent assists the customer in a two-way conversation. (10)
- The agent closes the case and the Messaging Session. (11)

Note: The SMS to WhatsApp solution is for service use. If a customer responds to the promotional message with a sales inquiry, have the agent create a Lead or Contact with the customer's phone number. Then use Marketing Cloud Connect to engage the customer.

Related Content

Review this solution's use case and purpose.
- Conversational Campaigns for WhatsApp on page 1

Take the next steps in this implementation.
- Configure Conversational Campaigns for WhatsApp
- Design Considerations
- Customer Opt-In

SEE ALSO:

Lightning Service Console

Set Up Routing for Messaging Channels in Service Cloud

Messaging in Service Cloud

MobileConnect

Marketing Cloud QueueMO API

Set Up WhatsApp in Service Cloud

WhatsApp Message Template Categories in Service Cloud

Send Automated Messages in WhatsApp

Channel-Object Linking (Beta)

B2C Services Best Practices

Digital Engagement WhatsApp Business Messaging FAQs

Einstein Bots

Connect a Standard Bot to Channels

Configure Conversational Campaigns for WhatsApp

Use these configurations to run conversational campaigns for WhatsApp.

- Verify that your computer is compliant within the WhatsApp Commerce Policy.
- Provision WhatsApp manually with Facebook Business Manager.
- Set up a verified Facebook Business Manager Account.
- Contact Carriers (United States and Canada) to approve SMS campaign.

1. Set up Lightning Service Console.

2. Set up Omni-Channel Routing for Messaging.

3. Set up Salesforce Messaging.

4. Set up Marketing Cloud SMS Code in MobileConnect.

5. Set up WhatsApp in Messaging.

6. Optionally, deploy Einstein Bots to your channels.

These templates are approved for WhatsApp

- WhatsApp limits service to Transactional Messaging only and does not permit Promotional Messaging. Because of this policy, if a customer has not sent a message in the last 24 hours, your agent cannot message them directly. The expired session is visible but inaccessible in the Messaging Session UI.

- To communicate with a customer more than 24 hours after their last message, WhatsApp requires businesses to use approved Outbound Messaging Templates. This template message must be sent from Process Builder or Flow.

←	Review earlier steps in this solution.
	• Workflow
→	Take the next steps in this implementation.
	• Design Considerations
	• Customer Opt-In

SEE ALSO:

Lightning Service Console

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Design Considerations

Keep these design considerations in mind when you run conversational campaigns for WhatsApp.

Marketing Cloud Sending Options

- Send marketing SMS messages through the Journey Builder or MobileConnect application.

  📝 **Note:** If you register for an SMS short code, expect a long waiting period. Carriers take up to 12 weeks to approve short code provisioning.

- Provide a WhatsApp link as an optional footer on all your outbound SMS messages.

- Display the link as a WhatsApp URL for transparency. WhatsApp links follow a consistent and identifiable structure: wa.me/[country code and phone number]. For example, wa.me/14150000000.
- Alternatively, generate a shortened URL with the **Shorten URL** button in MobileConnect, Content Builder, or Journey Builder when configuring the text of a new SMS message.

    Note: Shorten links with MobileConnect, Content Builder, or Journey Builder only. If you use external methods to shorten links, Marketing Cloud cannot track statistics.

Service Cloud & Digital Engagement Considerations

- Use the Channel-Object Linking (Beta) to link the customer's WhatsApp Messaging User record to their Salesforce Contact record.
- Communicate with customers through WhatsApp in real time or in asynchronous conversations for up to 24 hours after the customer's last message.
- Store messaging history in Service Cloud to use in future engagements.

Add Customer Contact to Service Cloud

- If the customer doesn't already have a contact record, Service Cloud uses their SMS phone number to create a user in Messaging Object. Your agent must ask the customer for their first and last name and manually add it to the contact record.
- Channel-Object Linking (Beta) matches a contact record and the messaging user record by SMS phone number. If you use Marketing Cloud Connect, Channel-Object Linking records this session in the contact's history.
- If you don't use Channel-Object Linking, use APEX triggers to match the Messaging User object record to a contact record by email or phone number. If no record exists, create a contact record and relationship.

Limitations

- Typical Governor Limits within Service Cloud do not apply to this solution.
- To communicate with a customer more than 24 hours after the customer's last message, WhatsApp requires businesses to use approved Outbound Messaging Templates. This template message must be sent from Process Builder or Flow.
- To stay below data storage limits, keep contact data in Customer Relationship Management. Only bring in other data as needed.

Related Content

Review earlier steps in this solution.

- Workflow
- Configure Conversational Campaigns for WhatsApp

Take the next steps in this implementation.

- Customer Opt-In

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Set Up Routing for Messaging Channels in Service Cloud

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B2C Services Best Practices

Customer Opt-In

Conversational campaigns for WhatsApp require different customer opt-in preferences. See opt-in settings for this solution.

Marketing Cloud Opt-In Considerations

Outbound SMS messages can only be sent to Subscribers who opted in to receive them.

- The initial Outbound SMS message sent through MobileConnect uses the customer's existing Marketing Cloud SMS Opt-In Status.
- If you created a MobileConnect subscriber from SMS-Opt-In, they are managed as a separate Marketing Cloud contact from the Service Cloud contact.
- If you created a MobileConnect subscriber from API using the Service Cloud Contact ID as the subscriber key, one contact can use the same consent flags.

WhatsApp Opt-In Considerations

- The customer's opt-in is session-specific. The session lasts up to 24 hours from the customer's last message.
- The opt-in flag is stored in Service Cloud on the Messaging Session Object.
- The Messaging Session Object opt-in flag is not a mobile opt-in for general SMS or other Messaging activities.
- When a customer clicks into WhatsApp, they implicitly opt in through the interstitial page. This grants WhatsApp and Service Cloud Messaging permission for a specific template. To broaden the permission for all templates and use the same flag in Service Cloud, create a custom field on the Messaging User Record with APEX.

Related Content

Review earlier steps in this solution.

- Workflow
- Configure Conversational Campaigns for WhatsApp

- Design Considerations

SEE ALSO:

MobileConnect

Marketing Cloud QueueMO API

Channel-Object Linking (Beta)

B2C Services Best Practices