### The Ultimate Guide to

## WHATSAPP CHATBOTS





# The Ultimate Guide to WHATSAPP CHATBOTS

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## The Hype AroundWhatsApp Chatbots

We've been in the conversational tech game since 2016, and as far back as we can remember, everyone in the industry has been counting down the days till WhatsApp releases a platform for businesses to engage their customers.

The reasons for this anticipation are obvious.

For starters, the sheer size of WhatsApp's reach is staggering. In February 2020, they crossed the 2 billion users threshold, cementing their position as the market leader in the instant messaging space. The country-wise breakdown of users is even more telling of their dominance. In a 2019 report, web-analytics firm SimilarWeb found that WhatsApp was the most popular messaging app in 112 countries (that's over half of the approximately 207 countries that currently exist in the world today). And as if those stats weren't enough, a study by Apptopia in 2018 found that in a span of just three months (May-July), WhatsApp users collectively spent a mind-boggling 85.21 billion hours using the app, which is especially large when you consider that the same study found that people used Facebook only 31 billion hours in the same time period.







**#1 MESSAGING APP IN 112 COUNTRIES** 



**30 BILLION USAGE HOURS PER MONTH** 

But to be quite honest with you, these stats don't even begin to tell the story of WhatsApp's importance.





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We think that what makes WhatsApp truly special is not the number of people that use the app or how many hours they spend on it, but rather, how those users spend those hours using the app.

WhatsApp is where people go share special moments with the people that they love, and that level of intimacy is something that most other messaging and social apps just can't compete with.

Think about your own WhatsApp usage. I'm willing to bet that if you were interested enough to download this report, you spend hours on WhatsApp for every single day checking out pics of your cousins' babies, sharing funny videos with your friends and most importantly reading irritatingly long, emoji-laden forwards (we all have that one friend/family member who does this). Would your friends and family share that sort of content with you on Facebook? Would you share that sort of content on Facebook? Probably not!

Well the same principle applies to your customer interactions as well.

If done right, building a chatbot on WhatsApp will let you slot your business into your customers' most cherished inbox and create a personal relationship with them that is not possible through other digital channels.

Of course, your ability to achieve this is wholly contingent on your ability to execute well, and that's where this ebook comes into the picture. In the following pages, we are going to get you up to speed with everything that you need to know about engaging your customers on WhatsApp (through a chatbot) so that you can tap into the platform's immeasurable value.









## What is a WhatsApp Chatbot

You guys probably already know what a WhatsApp chatbot is but for good measure (and because it gives us a good segue into the next section) here's a quick recap of the most dictionary-ish definition of WhatsApp chatbots we could come up with:

A WhatsApp Chatbot is a computer program designed to simulate a conversation with human users on WhatsApp to facilitate a trade of information or services.

Honestly, we don't like this definition at TARS because it's kinda boring, so we came up - with one that's a little more imaginative:

Imagine if your business was an actual person with thoughts, feelings, desires, and most importantly an account on WhatsApp that it can use to talk to customers. That person is a WhatsApp Chatbot.

This definition truly captures what it means for your business to have a WhatsApp chatbot. Your chatbot is an embodiment of your business on the internet.

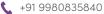
Of course, even the revised definition leaves something to be desired. Specifically, it doesn't tell us what a WhatsApp Chatbot achieves by talking to customers. Put differently, "if a chatbot allows your business to talk, what would it say?"

Well, as it just so happens, that's what we will discuss in the next section.









## 3. WhatsApp Chatbot Use Cases

#### **Automate Customer Service**

The aim of any good customer service operation is to help customers get the most out of a company's product or services.



Traditionally, there have been only two ways of achieving this. The first involves hiring customer service reps who can jump onto a call or chat with a customer to guide them through any questions they might have or direct them towards useful resources. This approach is great because customers find it easy to talk to human beings and with good reason! As a species, we're pretty good at understanding complex problems.

The only issue with this approach is that it is expensive.

Implementing a human-assisted customer support system requires businesses to invest time, effort, and money to hire, train, and manage reps. The end result is that even if your company is moderately successful at pulling in customers, the ratio of customer service interactions to customer support reps is going to be relatively high, and what you end up with is long wait-times on both phone and live chat, both of which kill customer satisfaction.





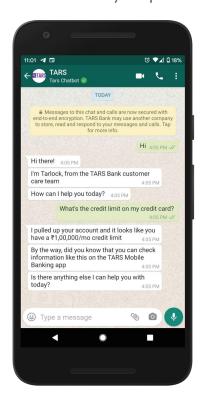
Most companies try to get around the cost issue of human reps using the second customer support approach: by creating online resources (e.g. blogs, videos, knowledge bases, forums). But let's be real, no customer is actually using those resources. The average customer barely has the attention span to read through a single Facebook or Linkedin Post let alone an entire blogpost explaining how they can better use your product or

services. When they call your customer service helpline they are probably going to ignore the automated message that says "if you don't want to wait to check out our online help portal," and get frustrated while they wait on hold to talk to a human.

#### **The Solution**

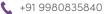
### WhatsApp chatbots are fully automated versions of your human customer support reps.

They can guide your customers through any queries, doubts, or issues that they might have, just like your human customer support rep would. The best part, though, is that since they don't require a human to operate, they are about as cheap to implement as your online resources and they can run 24x7x365.









#### **Generate More Leads**

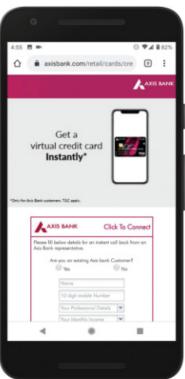
Whether you're a multinational financial services company or a local auto shop **lead generation is the bedrock of any B2C services business.** If you can't get enough people to book an appointment, share their phone number, or provide their email id, you won't be able to convert new customers and business will come to a screeching halt.

Unfortunately, traditional lead generation is broken. Most companies, regardless of size or industry, spend time, money and effort bringing traffic to their pages only to find that less than 5% of that traffic is actually converting into leads that can go on to become customers.

### At the root of the problem is the seemingly innocuous landing page.

Landing pages have long been the standard way for companies to capture leads, and while they do get the job done they aren't particularly good at it. People can't get through a Facebook post let alone an entire page of sales-y text, and absolutely no one likes filling out forms, yet landing pages rely on both of these elements to capture leads.

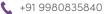
Most landing page templates today are nothing more than glorified brochures consisting of text and forms, and the end result is an unengaging buyer experience that bores people into closing the page.







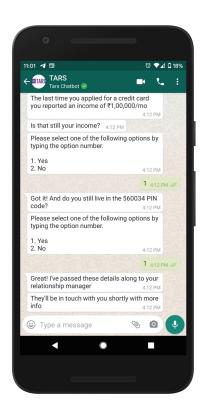




#### **The Solution**

WhatsApp chatbots are an engaging alternative to traditional landing pages. They transform the reading and form-filling associated with landing pages and turn them into conversations!

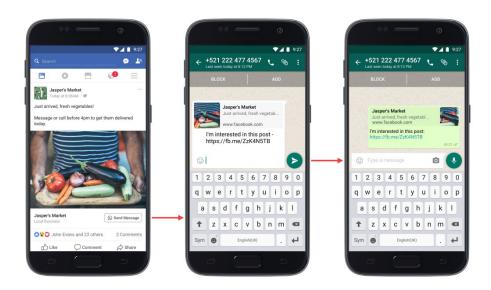
Conversations, especially ones over chat, offer a level of engagement that traditional landing pages just can't compete with. They are instant, dynamic and most importantly they feel more human than any webpage ever could because they mimic the interactions that your customers are already having on WhatsApp every day with their friends and family.



That sort of intimate engagement translates into a delightful buyer experience that converts at higher rates than traditional landing pages.

#### Improve Facebook Ads ROI

While rolling out the WhatsApp Business platform, Facebook made the prudent decision to allow businesses to send Facebook ad traffic directly into WhatsApp conversations.







This is great news for your ad campaigns for the same reasons we mentioned in the previous section. They transform the entire lead gen experience into a conversation and customers appreciate that!

To recap, conversations are instant, dynamic and they feel more authentic than your average landing page. The end result is that more people who click on your ads actually convert before dropping.

#### **Book More Sales Calls**



Scheduling is and always has been a pain. Between the constant WhatsApp conversations, email chains, and annoyingly long games of phone tag, figuring out a time for a sales call takes way more time than is necessary.

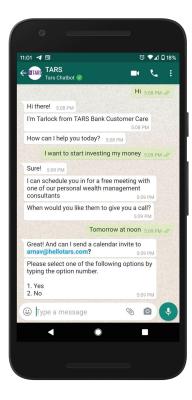
Calendar widgets (like Calendly) are a partial solution because they automate all the communication-related hassle. But they aren't perfect.

At the end of the day, they are nothing more than glorified forms, and that can turn some prospects off, resulting in an abysmal conversion rate, especially if appointment booking is at the top of your funnel (looking at you doctors).

#### The Solution

Think of WhatsApp Chatbots as automated personal assistants. They hook up to your sales teams' calendars and can help prospects book appointments through a WhatsApp conversation.

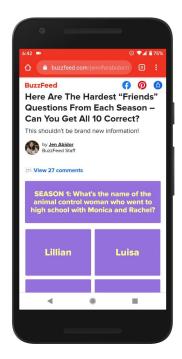
The end result is that your sales team spends less time stuck in frustrating email chains and more time closing deals.







#### **Conduct User Engagement Quizzes**



Quizzes are like magic tricks.

They transform tedious information collection processes like lead generation and consumer surveys into games, and in the process trick users into believing that these boring tasks are actually super engaging.

The issue is that a lot of the quizzes that your customers are taking get sent to them as links on WhatsApp and generally, the webpages that host the quizzes tend to be quite bad on mobile.

Put simply with slow load times, jerky animations, and minuscule images, webpages diminish the engagement value of your quizzes.

#### **The Solution**

WhatsApp Chatbots allow you to administer quizzes to your customers without having them leave the app. You can literally use the buttery smooth interface that the well-paid designers and engineers at Facebook have made to make your quiz UX better.



The end result is higher completion rates, more data, and more sales!





## 4 How to build a WhatsApp Chatbot

I know that for a lot of you this is the part of the guide you've been waiting for so let's jump right in.

There are two parts to building a WhatsApp chatbot:

Part A: Getting WhatsApp Business API Access

Part B: Building A Conversational Flow

It is important to note that these two parts do not have to occur in a particular order. In fact, we recommend that you get both started at the same time.

With that, here is a breakdown of each part.

#### Part A: Getting WhatsApp Business API Access

Before you can even start thinking about creating your WhatsApp chatbot you need to get access to the WhatsApp Business API.

To do this you need to go through a verification process so that WhatsApp knows exactly what your business sells and what you plan to do with a WhatsApp Chatbot. It only takes around 2 weeks to complete, but you'll find that when you actually get into the details it can get quite bureaucratic, so if you need help along the way feel free to contact us using the details in the bottom right. One of our experienced customer success managers will help you through the entire process.









If you want to do it yourself though, here are the steps:

#### Step 1: Verify your Business on Facebook

Since WhatsApp is owned by Facebook, they handle their business verification through Facebook's business platform.

You can find instructions on how to verify your business through Facebook over HERE

**NOTE**: If your company runs Facebook ads you probably have this step complete.

#### Step 2: Apply for Business API Access through a Third-party Vendor

WhatsApp does not directly provide API access to businesses. Instead, they do it through approved third-party vendors.

Once you have your business verified through Facebook you can apply for WhatsApp Business API access through one of these vendors.

Here are some of the providers we have worked with and the webpages where you can request WhatsApp API Access on their platforms:

Twilio: <a href="https://www.twilio.com/whatsapp/request-access">https://www.twilio.com/whatsapp/request-access</a>

360dialog: <a href="https://www.360dialog.com/en/whatsapp-business/">https://www.360dialog.com/en/whatsapp-business/</a>

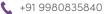
In this guide, we're going to show you how you can hook your bot up through Twilio.

#### Part B: Build out your chatbot's conversational flow

Just because the API verification process takes some time to complete, does not mean that you can't have some chatbot-related fun while you wait!



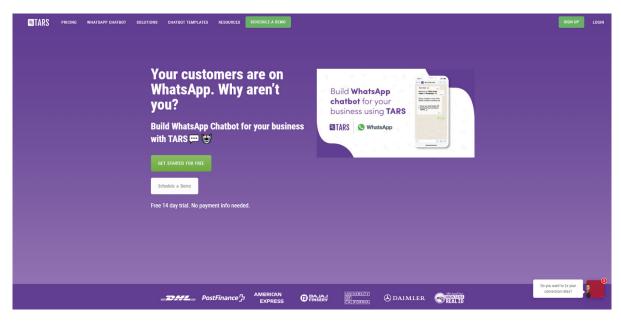




Here are the steps you can go through to create a basic **Leadgen+FAQ WhatsApp Chatbot**:

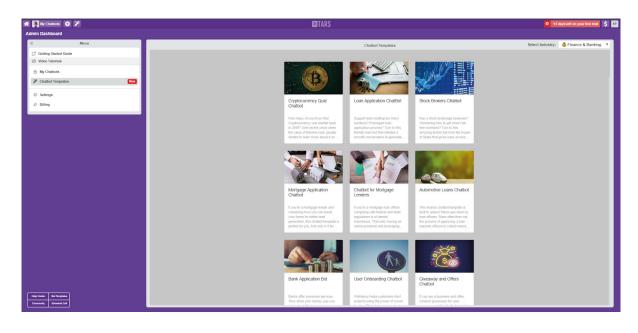
#### Step 1: Signup for the TARS builder

Go to <a href="https://hellotars.com">https://hellotars.com</a> and signup for free



#### Step 2: Create a new Chatbot

When you first signup for the TARS builder you will be dropped into our templates library:



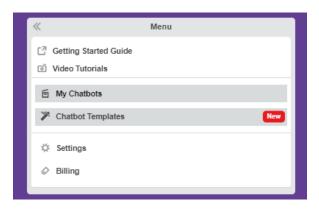


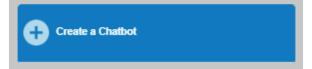
iii bit.ly/tars-whatsapp-chatbot☑ ish@hellotars.com



You can use any of the 950+ templates that we have as a base for your chatbot, but in this guide, we are going to build one from scratch so click the **My Chatbots** button on the left side of the screen:

On the following screen, click on the **Create a Chatbot** button and give your chatbot a name. This will open the chatbot creation canvas that looks like this:

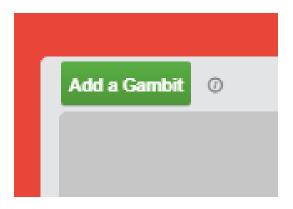






#### Step 3: Create a gambit

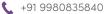
To start creating your conversational flow, click the green **Add a gambit** button in the top left of the screen:







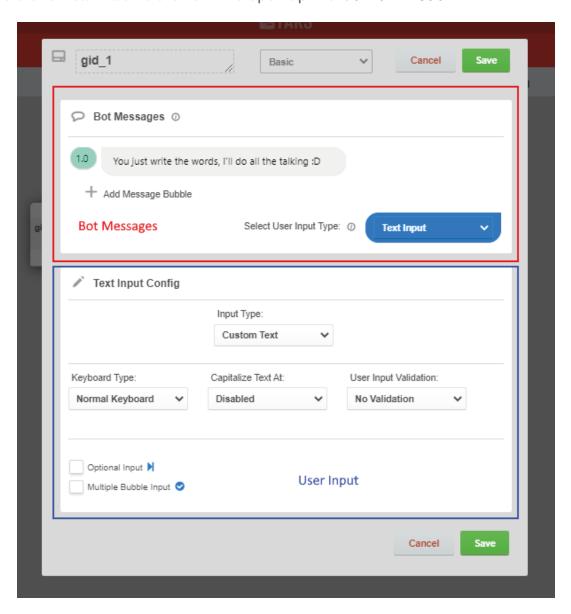




This will populate your canvas with a weird-looking object that looks like this:



This object is called a **Gambit**, and it is the basic building block of any conversation. To understand how it works click on it to open up the **Gambit Modal**:



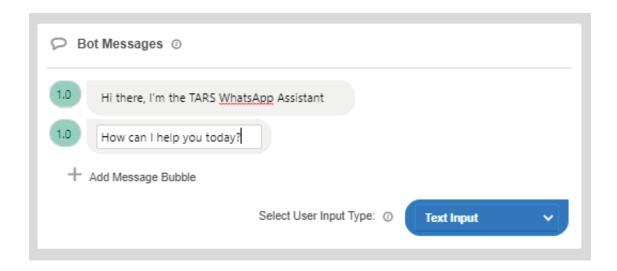


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As you can see, each gambit is made up of two parts: **Bot Messages** and **User Input.** Using these two parts of the gambit modal you can define a single back-and-forth interaction between the bot and the user.

Since we're still on the first gambit, go ahead and write the messages in such a way that they welcome the user to the chatbot:



Once the messages are complete, you can specify how users can respond to these messages by clicking the **Select User Input Type** dropdown.



We have over a dozen user input options available in our builder, but given the WhatsApp chatbot platform's limitations, only the text, button, image/file, geo-location, no input, and auto page redirection input UIs are compatible with WhatsApp chatbots.

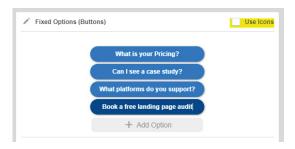
The most popular input UIs in the TARS builder are **text and buttons**, so we'll focus on those in this guide.





For the first gambit of the FAQ/Leadgen bot we are creating in this guide, select the **Buttons** option and drop all of the FAQs that you want the bot to answer in as buttons.





Since this is also going to be a leadgen chatbot, throw in an extra button for users to start the leadgen flow of the conversation. In the case of the TARS chatbot, we're going to let people book a free landing page audit (one of the many services we offer).

It is important to note that WhatsApp's API does not support actual buttons, so we map each button to an option in a numbered list like this.

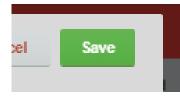
Please select one of the following options by typing the option number.

1. What is your Pricing?
2. Can I see a case study?
3. What platforms do you support?
4. Book an Audit

1:28 AM



Once the buttons are setup, rename the Gambit something descriptive (in this case intro), and hit the Save button.



You will now notice that the Gambit now has four red sockets sticking out of the bottom:



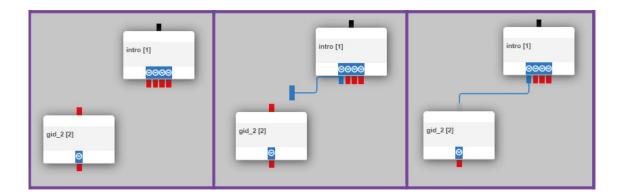
These sockets correspond to the button options we defined in the gambit. As you will see in the next step, they will allow you to branch the conversation off in different directions based on the user's input.



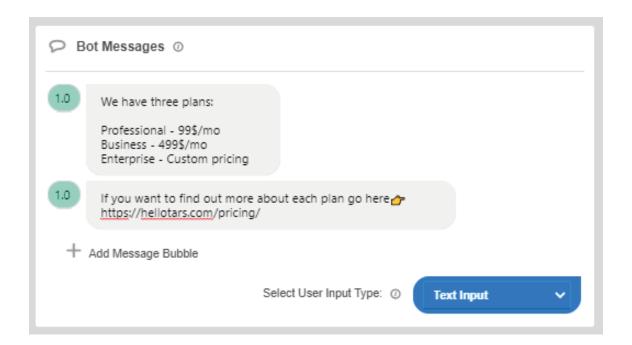


#### Step 4: Create a second Gambit and connect it to the first

Now that we've gotten the first back-and-forth out of the way it's time to flesh out the rest of the conversation. For starters, create a second Gambit and connect it to the first Gambit like this:



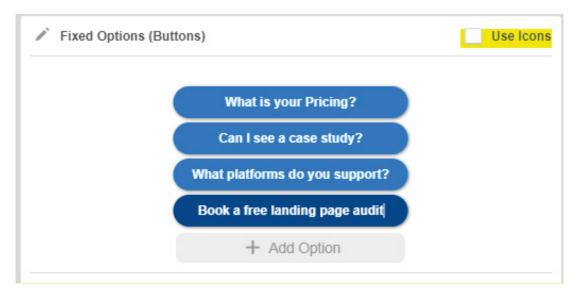
Fill out the messages in the second Gambit so that it responds to the corresponding question that we specified in the first gambit. In the TARS bot that I am making in this example, the first question had to do with pricing so we are going to tell users about







Be sure to add the options from the first gambit to the second Gambit as well, in case the customer wants more information:

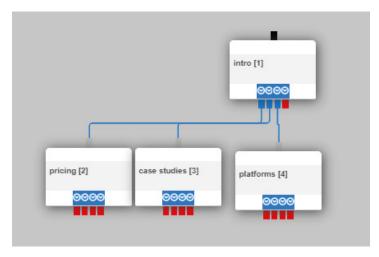


And don't forget to rename the Gambit something descriptive:



#### Step 5: Repeat Step 4 till you have Gambits for every FAQ

This step is about as easy as it sounds. Create new Gambits for each of the FAQs you defined in the first gambit, fill them out with messages that answers one of the questions, rename the Gambit and connect it to the corresponding socket in the first Gambit so that your flow looks something like this:



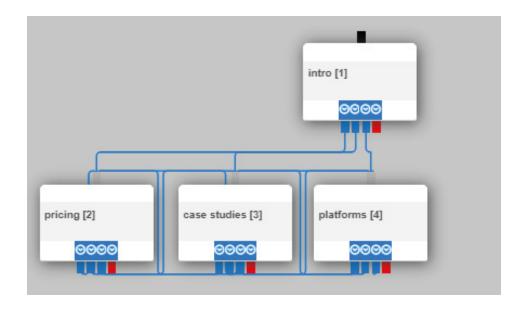




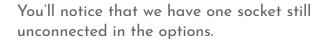


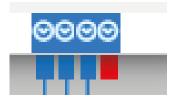


Also, since we re-added all of the options from the first Gambit to each of the FAQ Answer gambits, we need to connect all of the empty sockets in the new gambits we created to the appropriate answer:



## Step 6: Build out the lead gen flow

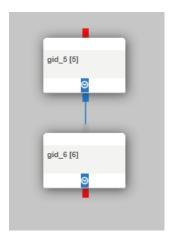




This corresponds to the leadgen flow, which we want to build out. Before creating your leadgen flow in the builder, decide on what details you want to capture as part of each lead. In the case of the TARS chatbot, we are going to collect two details:

- 1. Email ID
- 2. Landing Page URL

Once you've settled on the details, create one Gambit per detail and connect them up in a chain like this:



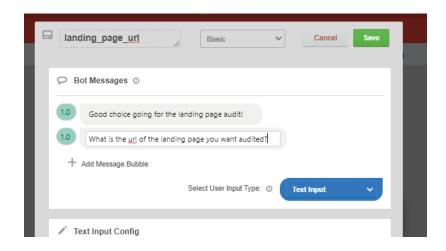






After they are connected to each other, you will need to jump into each one and define the messages and user input just like we did in the FAQ Gambits.

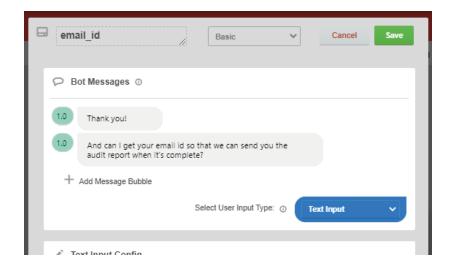
In the TARS chatbot example, the first leadgen Gambit is going to accept the landing page URL detail so we're going to jump in, define the messages such that they ask for this detail and rename the gambit **landing\_page\_url**.



You'll notice that we don't need to change the input UI for this Gambit because we need to use plain text input to accept a URL:



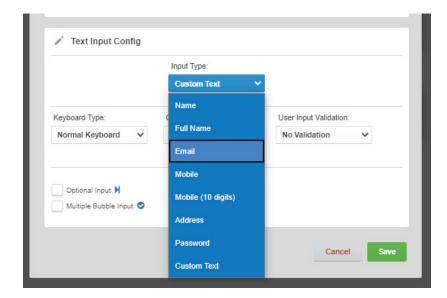
Similarly, in the second leadgen gambit, we're going to rename it **email\_id**, and define the messages to ask for this detail:





bit.ly/tars-whatsapp-chatbotish@hellotars.com+91 9980835840

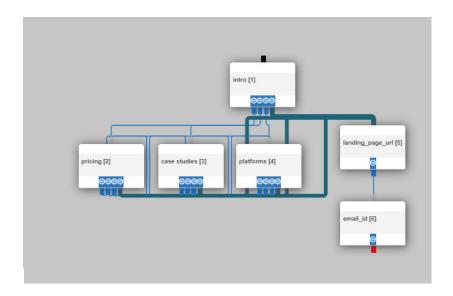
To collect email IDs we're going to have to use text input as well but before closing out of this Gambit, we are going to adjust the verification of the text input to email using the dropdown in the input UI section of the Gambit:



This will ensure that the users only submit their email id. If they submit something else, the bot will prompt them with a message like this:

Please give a valid email. e.g.. newton@gmail.com

Once your leadgen flow is setup like mine is above, you can connect the empty sockets of the other gambits to the leadgen flow like this:





bit.ly/tars-whatsapp-chatbot



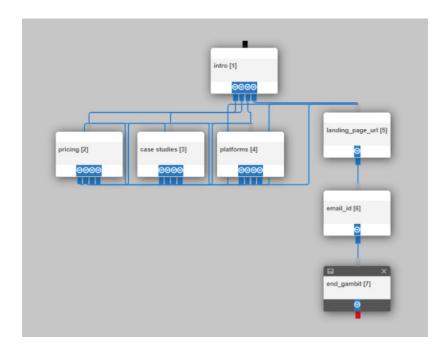


#### Step 7: Complete the flow

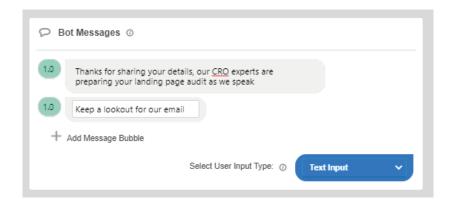
At this point you should have just one empty socket in the flow left at the bottom of the last leadgen Gambit:



To close this out, create another Gambit, rename it **end\_gambit** and attach it to the flow like this:

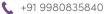


Write the messages in this Gambit such that they thank the user for sharing their details in the leadgen flow:









And finally, select Auto-page Redirection option in the input UI drop down:



Hit save on the gambit, and you'll notice that the socket at the bottom of our **end\_gambit** is now black:



This means that the conversation ends there.

In a WhatsApp chatbot, this just means that the next time the user talks to the bot, it will start the conversation from the beginning.

#### Step 8: Test your bot in webview

At this point your flow is complete and even if you haven't got WhatsApp Business API approval yet, you can test it out in our webview, by hitting publish:



And then clicking the arrow button next to it:







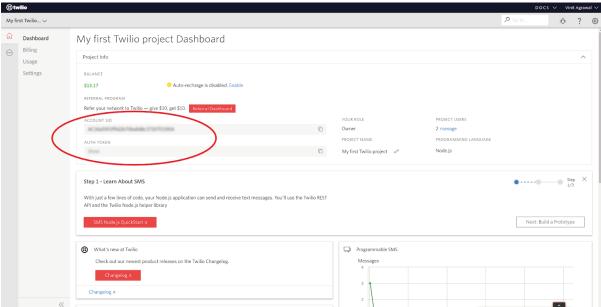
This will open the bot up in a new tab where you can interact with it to see how the flow works:



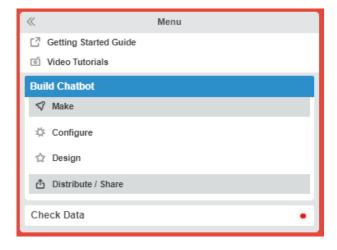
NOTE: You can also use this web chatbot as a customer service tool by sharing it as a link or deploying it as a website widget.

### Step 7: Hook up your bot to your WhatsApp Business API credentials

After you receive approval from WhatsApp Business API access from Twilio, you will need to jump into your Twilio account, go to the Twilio Dashboard (<a href="https://www.twilio.com/console">https://www.twilio.com/console</a>) section and copy the **Account SID & Auth Token**.



Once this is done, go to the Distribute/Share section of the builder:

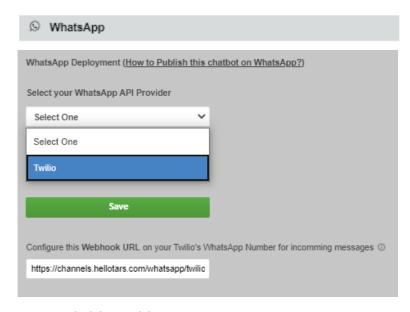








Select WhatsApp from the channels on the left and then select Twilio from the API Provider Dropdown



Input the copied keys into the appropriate fields and hit save:

Enter your Twilio AccountSid (How to get Twilio AccountSid?)
Enter your Twilio AuthToken
Save

Doing this will let your chatbot send messages through your Twilio-enabled WhatsApp Business Number.

You still however, need to give Twilio a way to send messages received on the number form users to the TARS builder so that it knows how and when to respond.

To do this, copy the **Webhook URL** that appears below the save button:

Configure this Webhook URL on your Twilio's WhatsApp Number for incomming messages ②

https://channels.hellotars.com/whatsapp/twilio

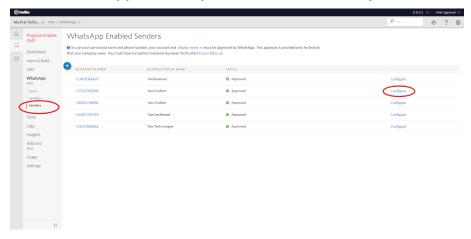




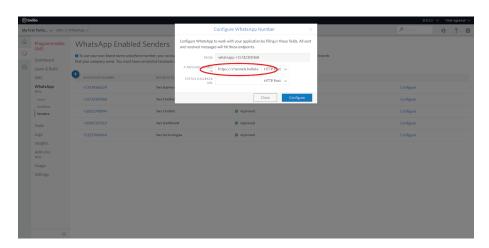




Click on the **WhatsApp Senders** option in your Twilio Dashboard and click on Configure option for the WhatsApp number you want to connect in your Twilio dashboard:



Finally, enter the copied Webhook URL in the **A Message Comes In** field (keep the dropdown value to be HTTP Post) and hit **Configure** 



#### Step 9: Test your bot in WhatsApp

Now it's time for the fun part.

Hit Publish Chatbot in the TARS builder again:







And start a conversation with the chatbot in WhatsApp using the WhatsApp Business Number associated with your API credentials:

Your bot should respond to you using the flow that you created in the builder.

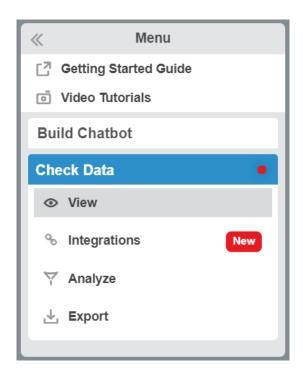
At this point, your bot is ready to be shared with users! We'll talk about how you can bring users to your WhatsApp Chatbot in the next section.



#### Step 10: Check the conversation data

Once you've had a conversation with the bot (in webview or in WhatsApp), you can check the conversation data in the builder to see how your bot is performing

To do this, click on the Check Data section in the menu on the left:







You'll notice that there are 4 options for how you can leverage conversation data. Here's a breakdown of each one:

#### View

The view option lets you do some basic data analysis right within the builder.

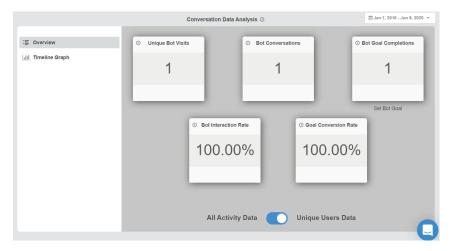
In this section you can see a running list of all the conversations that your bot has had:



#### Analyze

The analyze section lets you analyze how your bot is performing. Currently the builder offers two options for doing this.

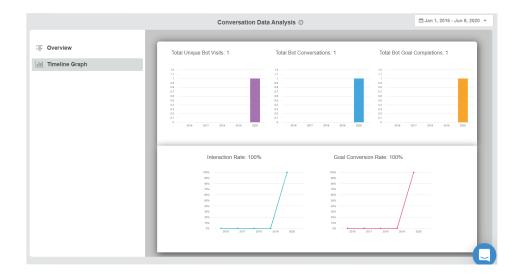
You can either look at a set of summary statistics about the bot's performance:







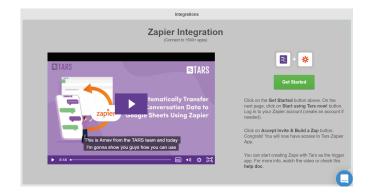




**NOTE:** If you want to learn more about what these statistics are check out our guide on the topic **HERE**.

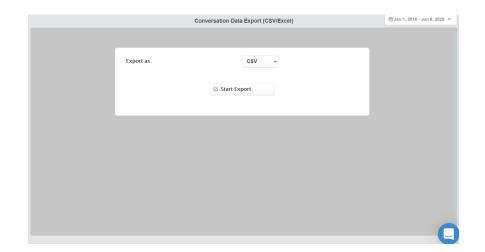
#### Integrate

Using the Integrate section you can hook up your bot to your favorite CRM using our Zapier integration.

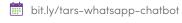


#### **Export**

For the real data nerds out there we give you the option of exporting conversational data as a CSV for analysis in excel:











# How you can bring customersto your WhatsApp Chatbot

Ok so you've built a WhatsApp Chatbot and you're ready to yield all that WhatsApp-y goodness for your marketing/-sales/customer service team. Well, there's one more step you need to complete before that can happen:

#### Getting your customers to actually talk to the bot!

Here are four ways customers can access your WhatsApp Bot



#### Saying "Hi"

This is quite literally as easy as it sounds. Put your WhatsApp Business Number on your website, landing pages, in your email footers, and tell your customers to contact you there.

If they take you up on your offer and message the number, you're in business! The WhatsApp Chatbot will handle the rest.

#### Clicking on a WhatsApp Website Widget

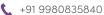
Customer service widgets have become a ubiquitous element of websites across the web, and you can use the same tech to bring people to your WhatsApp chatbot. Using a service like ElfSight or Widget-Whats, you can add a WhatsApp widget to your website that drops visitors right into a conversation with your WhatsApp Chatbot.











#### Clicking on your Facebook Ads

We already talked about this earlier but Facebook gives you the option of sending people who click on your ads to a WhatsApp Business conversation.



If you have a chatbot setup on your WhatsApp Business number then it will talk to all of the people who click on your WhatsApp-enabled ads.

#### Scanning A QR Code

QR codes used to be a niche technology used only by tech enthusiasts but with QR readers built-in to the default camera apps on most phones, everyone today knows how to use QR codes!

You can put a link to your WhatsApp Chatbot behind a QR code and post the QR code up on posters, billboards, and brochures in the real world so that your customers can get in touch with your WhatsApp Chatbot.



A QR code to the TARS WhatsApp Chatbot















WhatsApp chatbots are still in their nascent stages as a technology, and it remains to be seen whether they become a serious contender in the ever-more competitive war for customer attention. Of course, as we discussed in the introduction, the numbers are in WhatsApp's favor. With over 2 billion users spending quality time on the platform, it seems as though the messaging app we all know and love will become the next big user engagement platform. If this is the case, then early-movers stand to benefit the most.

Building a WhatsApp chatbot today is like building an app in 2009 when smartphones were in their infancy. You will be getting a headstart on your competition, so if the tech does actually take off in the coming years and months, you will inevitably be a market leader on the platform. And the best part is that if you've made it this far in this ebook, you have all the tools that you need to turn this potential value into a reality.

That being said, we do recognize that the process can be intimidating especially if you are new to chatbots, so if you do need help with any of the stuff we talked about in this ebook, feel free to reach out to us using the contact information on the next page.





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## Get in touch with us!



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