WOZTELL

MAKE THE MOST OF WHATSAPP API AND ZOHO CRM

In this ebook we'll give you 50 tips to help you get the most out of Zoho's integration with the WhatsApp API. We hope you find it helpful!

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INTRODUCTION

Make the most of WhatsApp API and Zoho CRM

Before we begin, let us introduce ourselves. Woztell is one of 66 WhatsApp Business Solution Providers worldwide. We have developed a solution that allows you to work with WhatsApp in different areas, and one of the most developed is the integration with Zoho CRM.

WHATSAPP API AND ZOHO CRM: THE PERFECT MATCH!

At Woztell, we have worked hard to make the integration between WhatsApp API and Zoho CRM work as smoothly as possible, turning WhatsApp into yet another channel that your teams can use to communicate with customers, in a more direct and simple way.

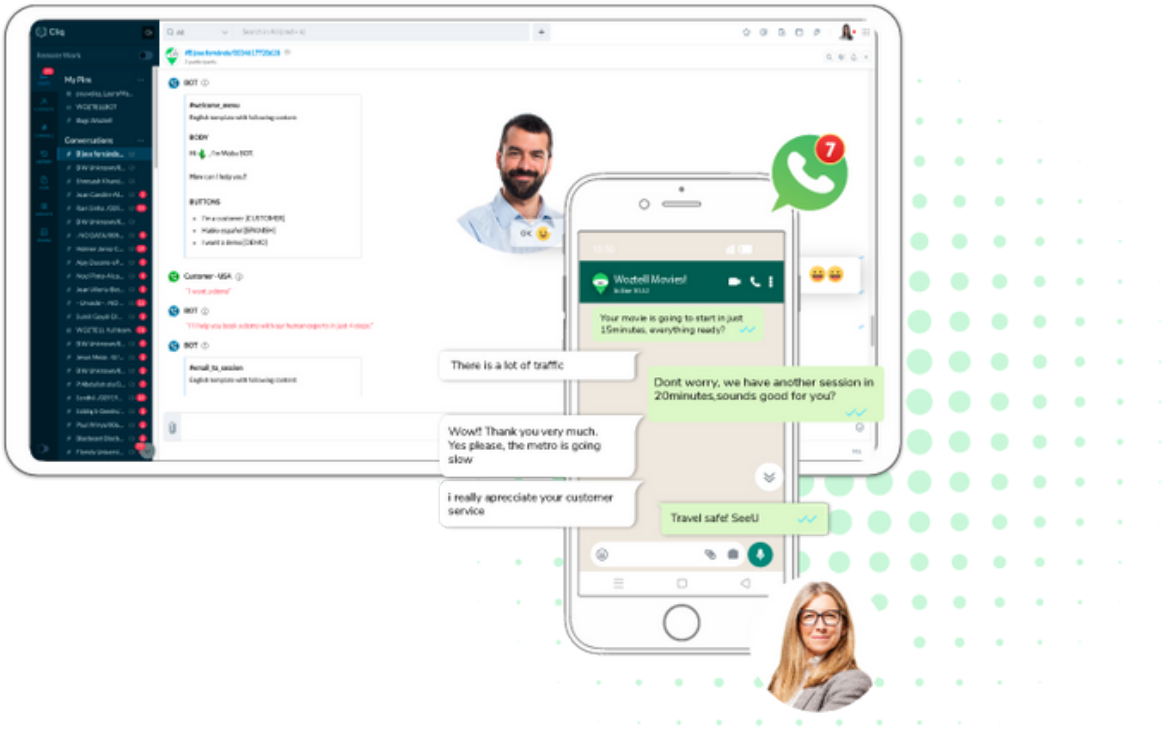
You will be able to send and receive WhatsApp messages directly from your ZOHO CRM, view incoming/outgoing messages from your leads or contacts, send WhatsApp bulk messages, or schedule your marketing campaigns, among other options.

Do it all without leaving Zoho CRM

You can manage your company's WhatsApp communications in a simple, unified way, without leaving your ZOHO CRM.

With the Woztell extension in your ZOHO CRM, you can not only see who in your team is sending WhatsApp messages, but also see the message itself and when it was sent.

Imagine having control of all your company's WhatsApp communications!

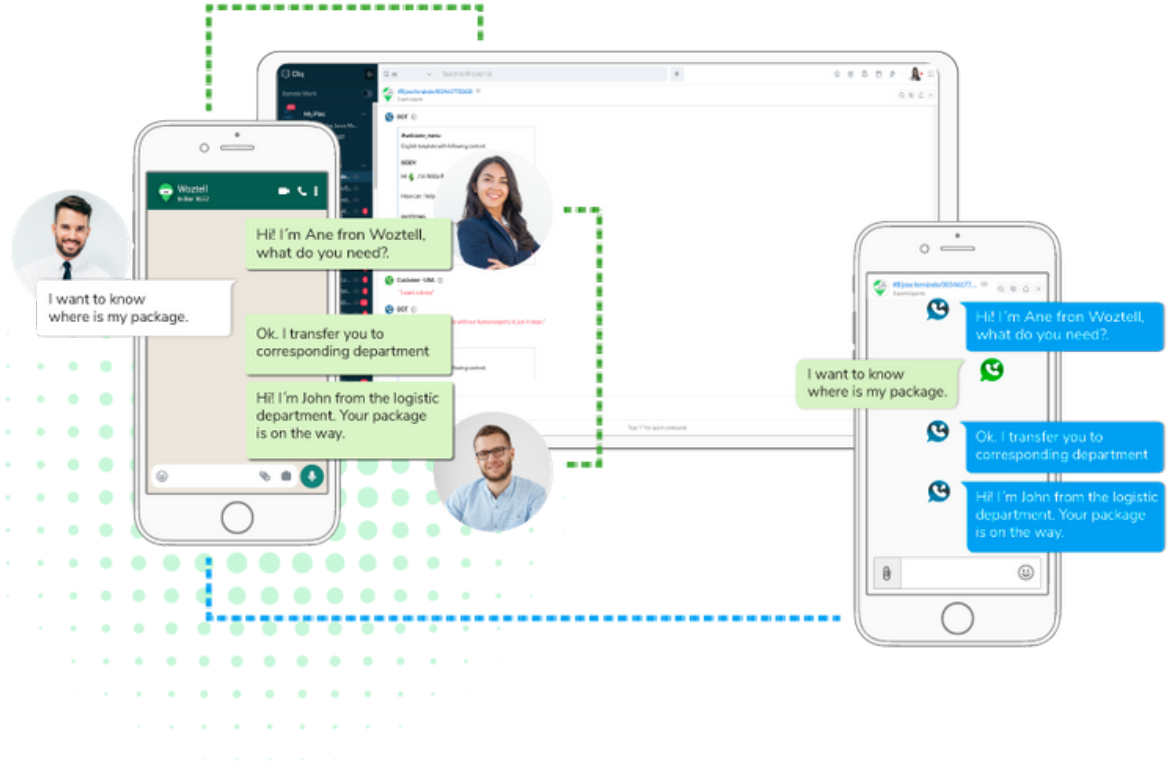


Zoho CRM & WhatsApp API integration features:

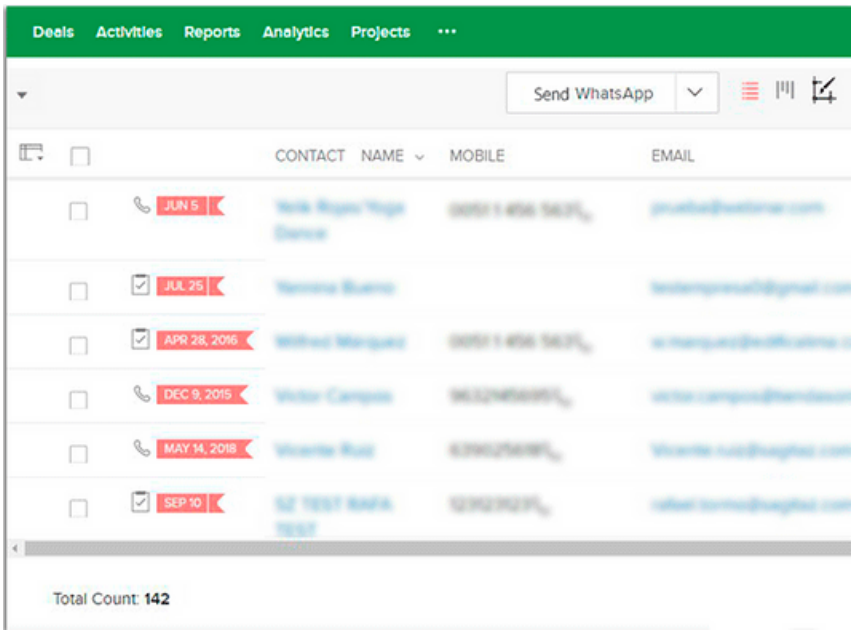
- **Status of WhatsApp sent messages within your ZOHO CRM.** Check the status of your outgoing WhatsApp messages and verify if they are being sent, received, read, or rejected.

- **Collaborative work on WhatsApp using your CRM.** Use WOZTELL collaboratively. Add multiple team members to the same WhatsApp conversation and assign tasks simply and easily.

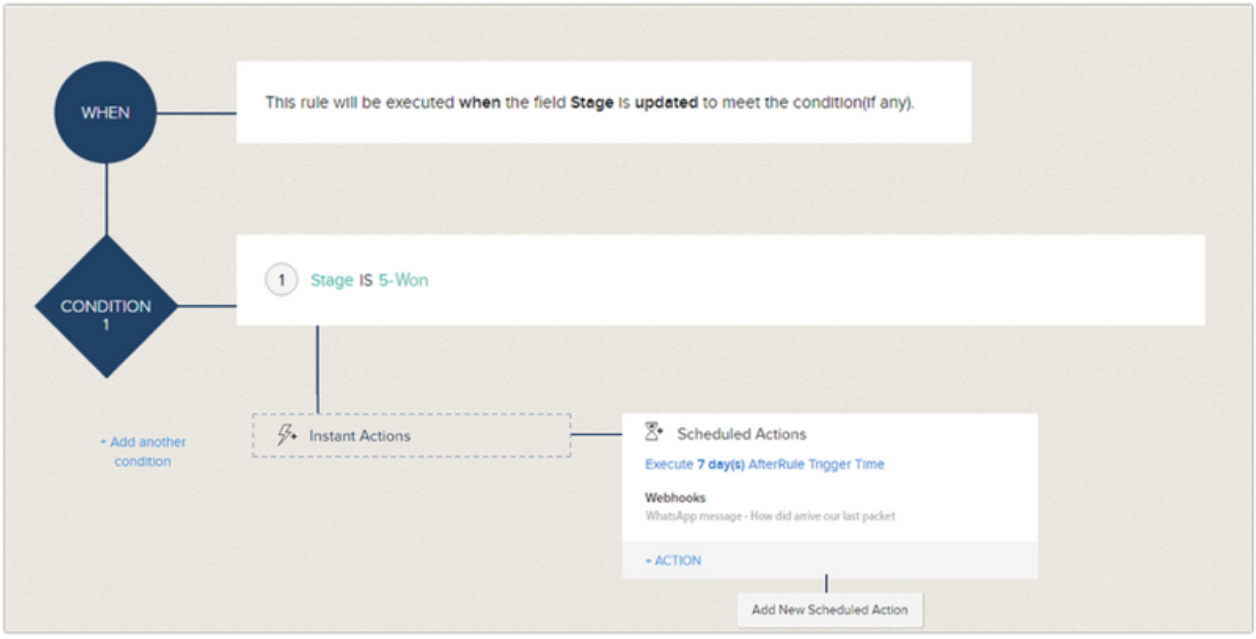
- **Multi-platform and multi-device.** The integration of Woztell with ZOHO CRM and WhatsApp API works from different platforms and can be used on any device, be it PC, tablet or mobile.



- **Massive sending of templates** to WhatsApp from Zoho CRM to communicate with your customers and be able to launch communications, updates or campaigns.



- **Workflows based on changes in CRM.** For example, automate responses and actions based on a change of opportunity status, or any other variable in your CRM, and save time in your customer service processes.



50 IDEAS TO GROW YOUR BUSINESS

Integrating WhatsApp API and Zoho CRM

We want to make your business a success, and to do so we have prepared this list of 50 Ideas to make the most of the integration between WhatsApp API and Zoho CRM.

To simplify and consolidate, we have divided these ideas into 9 different topics:

- Global vision of WhatsApp and Zoho CRM
- WhatsApp API marketing strategy for your social media
- WhatsApp API marketing strategy for your website
- Pre-sales with WhatsApp and ZOHO CRM
- Customer service and post-sales with WhatsApp and Zoho
- Sales and lead generation using WhatsApp API and ZOHO CRM
- Automation and workflows in ZOHO CRM
- Teamwork with WhatsApp and ZOHO CRM
- Chatbots on WhatsApp integrated with Zoho CRM

Global vision of WhatsApp and Zoho CRM

1. Get your verified WhatsApp business account:
With a verified WhatsApp business account, your customers will trust your WhatsApp account because your corporate number has been registered. This increases your message open rates and conversion rates.

2. Collaborative work with WhatsApp:
Woztell's WhatsApp API integrated into your Zoho CRM will allow you to coordinate your team from within customer conversations, with the customer remaining unaware of the coordination conversations.

3. Traceability of information:
If your team uses their personal WhatsApp to assist your customers, you will miss out on a lot of information because it's not in your CRM. The integration between WhatsApp API and Zoho CRM, allows you to track all incoming/outgoing messages made by your team.

4. Increase the visibility of your communications:
Compare these figures: the open rate for email is about 17%, whereas the open rate for messages sent via WhatsApp is 98%. By changing the channel of communication, you will drastically increase the rate of messages seen by your customers!

5. 24/7 service:
A Chatbot on WhatsApp API integrated with your CRM can work for you 24/7, and answer all your customer inquiries instantly. Front-line answers could be automated responses and, if needed, you can transfer to an agent to handle complex inquiries.

WhatsApp API marketing strategy for your social media

6. WhatsApp contact button on the company Facebook page:
With 2.449 million Facebook users, it is the social network with the most users worldwide. Your Facebook page allows you to add buttons; why not add a button with the link to your WhatsApp?

7. Facebook Ads campaigns:
If you use campaigns on Facebook Ads, you can create WhatsApp click-through ads in the Ads Manager. To run this type of campaign, you must associate your business page with your WhatsApp API number. You will be able to run campaigns on Instagram, Facebook, and the entire Facebook ad network including, for example, Instagram Stories.

8. Instagram profile:
There are around 894 million users on Instagram, and most sessions are happening on mobile devices. We recommend you do the following:

- Use a WhatsApp API link instead of typing the phone number, to make it easier for the user to click and be directed to talk to you via WhatsApp. The link has this format http://wa.me/00XXXXXXXX. The X represents the WhatsApp API number.
- Add a default message, based on the campaign you have active.

9. Linkedin with WhatsApp:
Linkedin is the social network of reference for professionals; if you decide to use the company's WhatsApp as a contact channel, you can include it in your profile for direct contact.

10. Contacts on Linkedin:
You can include it in your publications; be it company publications, where you are interested in direct contact with the client, or a publication on your personal professional profile.

11. Post with the link to your Wa.me
On Facebook, Linkedin, Twitter, and other Social Networks, you can post links. Until now, marketing teams tried to get traffic to their websites, but you can put the link directly to your WhatsApp. With this, you will be able to receive direct messages from your customers.

WhatsApp API marketing strategy for your website

12. Update your Contact page:
Users who have reached the Contact page usually arrive with the intention of being proactive, either by filling out a form or by sending an email. We recommend adding a WhatsApp button so that the visitor can contact your company directly.

13. Floating action button on your website:
The floating action button is a button that is displayed in all sections of your website. If you have a floating button on your site, we recommended integrating it into all sections of the site, with a direct link to WhatsApp.

14. Website footer:
We recommend adding a button to the footer of your website, that allows your customers to contact you directly via WhatsApp.

15. Landing pages:
Landing pages are pages that are specifically designed to convert visitors into Leads. You can use a contact button with a default message, instead of a contact form, as a mean to Optimize your Conversion Rate (CVR).

16. Blog posts:
One important strategy of marketing is Content Marketing; we recommend that within each article on your blog, you make a call to action with very specific texts. For example: "If you have any questions about these features, you can send me a WhatsApp here".

Pre-sales with WhatsApp and ZOHO CRM

17. Pre-qualification of leads in B2B business:
The pre-sales teams are responsible for obtaining the necessary data to fill in the CRM so that salespeople have the information they need to work. Your pre-sales team will be able to request all this data directly through WhatsApp and thus be faster and more efficient.

18. Pre-qualification of leads in B2C business:
If you are in sales, think about the end customer. If you are using WhatsApp, your conversations will probably be mainly Customer Service, however, you may also have some conversations related to closing a sale. In this scenario, being proactive, sending links, and answering all questions via WhatsApp will help you close the sale.

19. Pre-sales channel:
The customer's first contact with your company will be with your pre-sales team; what better than being able to assist them right from the start using the channel that is currently most convenient for the customer: WhatsApp.

20. Traceability of information from the first contact:
Thanks to the integration of Woztell with your CRM, you will know if the person contacting you is a customer, a potential new customer, or a potential recurring customer. If they are already in your database, when a WhatsApp message arrives you will see their name; if you have never had contact with them, you will see them as an unknown person.

Depending on whether the person we are talking to is a customer or a potential customer, we need to handle it in one way or another. You can set up guidelines and train your agents while they practice with real conversations. You can also configure Woztell so that messages go directly to one agent or another depending on whether it is a new contact or not. Remember, presales should only respond to new customers.

Customer service and post-sales with WhatsApp and Zoho

21. Real customer service interactions:
Acquiring a new customer can cost five times more than retaining an existing one. You can assist your customers in real-time, by integrating WhatsApp with Zoho CRM.

22. A personal touch in customer service:
"Hi, Juan! I saw your company on the local news, congratulations!". If you respond to your customers with a personal touch, you'll have a better chance of building customer loyalty. You can program a personal touch for when your customer initiates a conversation (emojis work great too!).

23. Real-time feedback from your customers:
In addition to offering a real-time solution, you can also have real-time feedback; when you close a conversation, you can request feedback with a predefined template and your customer can do it comfortably from their WhatsApp.

24. Incident resolution templates:

With WhatsApp API, you can create different types of templates; for example, inquiry resolutions. You can send notifications to your customers regarding inquiry resolutions by creating a WhatsApp API template, and also check the Inquiry Resolution history in your Zoho CRM.

25. Your entire team in one WhatsApp conversation:

This is one of the most popular features of the Woztell integration. You can have all your team members interact with your client in the same conversation. For example, if you hire a new team member, they need to be trained, so they can be supervised by the team leader and another colleague can help them, all in the same conversation with the client.

The good news is that the customer will not be able to see internal communications, and won't even be aware that this is happening.

26. Create follow-ups from within conversations:

Within a conversation, you can add your teammates, and set reminders. With this feature, you can choose, for example, the user, the subject, the time, and the date.

27. Tag leads in WhatsApp and Zoho CRM:

You can tag leads based on predetermined criteria. This feature will help you quickly identify any lead. For example, you can tag a lead that has already decided to buy and set a follow up in your CRM with specific nurturing.

28. Pin messages or comments:

You can anchor messages in customer conversations in order to not lose focus of where you are going with the conversation. For example, you can anchor a message where the lead is requesting personalized training in your office next month.

Sales and lead generation using WhatsApp API and ZOHO CRM

29. Forget about forms and start interacting:
Customers must be contacted, and the faster you contact them, the more chances you have to close the deal. Send your potential customers directly to WhatsApp instead of to a form and... break the norm!

30. Use predefined messages to start the conversation:
WhatsApp has the feature to predefine the first message in the link you post to contact your company. With this type of message, you can target your potential customers to write to you easily. Predefined message links open the WhatsApp mobile or desktop application with a pre-written message so that the user only has to press send.

31. Link your social media profiles with your WhatsApp:
You can define calls to action on your social media profiles. If you define a WhatsApp button, you will easily reach your followers and start instant interaction with your customers.

32. Social media lead generation using a WhatsApp and Zoho CRM strategy:
In Facebook and Instagram Ads, you can create Calls To Action, directly on your WhatsApp Business account, forgetting about websites, forms, emails, phones, etc. In a few clicks, you can have all the information inside your Zoho CRM, and once the conversation started you don't have to stop.

33. Don't end the conversation:
Woztell's integration will allow the conversation initiated by the chatbot on your website to reach your pre-sales team. While the bot can answer the simplest of questions (freeing up a lot of work for your team), thanks to the integration with Zoho CRM you can take control of the conversation any time a "human touch" is required.

34. Sell through WhatsApp:
You can close deals with your customers instantly; in the same way you send a photo of your pet, you can send invoices, purchase links, etc. You can add the deal to your Zoho CRM and follow up with WhatsApp.

35. WhatsApp templates for account updates and payment:
WhatsApp allows 10 different categories of templates, some of them related to sales. For example, Account Update, Payment Update, and Personal Finance Update - use them to your advantage!

36. Automated Lead Pre-qualification:
When a message is received from a new lead, automated questions can be asked to help save the agent valuable response time, or agent assignment rules can be set based on the questions asked.

Automation and workflows in ZOHO CRM

37. Meeting reminders:
When visiting or setting up a meeting with a customer, a reminder of the visit or meeting can be sent using a template.

38. Zoho CRM workflows based on incoming messages:
Because the texts your customer sends can be customized, you can set up specific responses, workflows, or chatbots based on those texts.

39. Use Zoho CRM to plan your WhatsApp marketing campaigns:
Create targeted marketing campaigns by sending Whatsapp Message Templates; select leads or existing contacts in your Zoho CRM, and customize the date and time of the message, based on the templates you have approved.

40. Save time with Related Views in Leads / Contacts in Zoho CRM:
You can automate which Leads you need to interact with first, based on your priorities or time. You can set time rules and prioritize which lead to contact first.

Teamwork with WhatsApp and ZOHO CRM

41. Tag your teammates in your WhatsApp conversation:
If you have someone in your team who needs training, you can tag your teammates, and coordinate all kinds of responses. In Woztell, you have three types of messages you can send from Zoho CRM: WhatsApp incoming/outgoing messages and team messages.

42. Coordinate and validate replies in your WhatsApp conversation:
It doesn't matter if you don't know-it-all, you have a team that can help you reply with the right wording. In this scenario, you can improve any reply with Woztell's teamwork feature. This can be very useful when the WhatsApp message is really important.

43. Create reminders in your WhatsApp conversation:
When using Zoho Cliq interface to send and receive WhatsApp messages, the interface will also allow you to create Reminders for you or other colleagues. This is is a great feature as instead of generating a task in your CRM, all you have to do is select the message, create a reminder for you or a teammate, and set the date and time of the reminder.

44. Mention another lead in the same conversation with your team:
One advantage of integration is that you can mention different leads among your team members and thus be more efficient in distributing the work among them.

Chatbots on WhatsApp integrated with Zoho CRM

According to the latest statistics, most users, more than 75%, prefer to use WhatsApp to make inquiries, more so than any other channel such as the FAQ section of a website, phone call, email or SMS. WhatsApp Chatbots are becoming increasingly popular, for example, the World Health Organization (WHO) created a WhatsApp Chatbot for worldwide reporting of Covid-19 in April 2020.

45. Pre-qualification by a chatbot:

As we discussed earlier, the people in charge of Lead Qualification are the pre-sales team members. With Woztell you can have a chatbot ask the first qualification questions (what we call pre-qualification) and register the lead in CRM, saving valuable time for your sales team.

46. Assist in multiple languages:

Creating a Chatbot can be one of the best options for your business. You can provide assistance in multiple languages, just like we do in our Chatbot at Woztell. The customer only has to select the language and everything else will be shown in the language they selected.

47. Exponentially increase your response rate with a WhatsApp Chatbot linked to your Zoho CRM:

According to Facebook data, compared to more traditional channels, surveyed individuals who send messages to businesses say that instant messaging services provide them with the following:

- Faster response times: More than 59%.
- Better advice and service: More than 50%
- More truthful answers: More than 49%

If you are still using traditional channels, think about the time you can save by using a Chatbot to automate responses to the most frequently asked questions.

48. Chatbot integrated into your website:

More than 50% of Internet traffic comes from mobile devices. With the integration of Woztell, WhatsApp API, and Zoho CRM you can have WhatsApp chatbots on your website, directly connected to all the traffic coming from mobile devices, and allowing you to increase Conversation Rates on your Website.

49. Better customer experience:

Businesses have many different ways to differentiate themselves from other competitors. By using a well-designed Chatbot, you can better manage customer touchpoints and stand out from the competition.

50. Push WhatsApp Chatbot data to your Zoho CRM:

The secret of great companies is that they try to optimize every process. With Woztell's WhatsApp Chatbots, you are able to obtain and push the data that was collected by your chatbot to your Zoho CRM.

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ANY QUESTIONS?

We hope you enjoyed this list. This is really just a small part of what Woztell's integration between WhatsApp API and Zoho CRM can do, but we believe that you can get a lot out of this list and get an idea of how WhatsApp can change your business and increase your sales!

Do you need more info?

Visit us at **woztell.com** or send us a WhatsApp: https://wa.me/16506145421

Still stuck in the past?

Write us at presales@woztell.com