

WhatsApp

# Best practices for marketing messages on WhatsApp



from  Meta

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Creative excellence

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Marketing messages with optimizations

New metrics and tools

SECTION 1

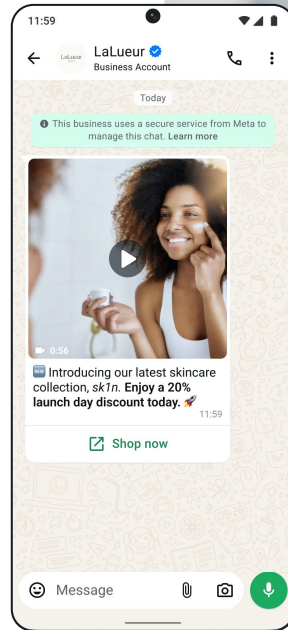
Introduction:  
The value of marketing  
messages and the critical  
role of quality



# It's all about value

**For consumers,** marketing messages drive more personal and valuable connections.

**For businesses,** marketing messages provide a high performing re-engagement channel.



# What consumers want

## Why do people love business messaging?

Customers now prefer a seamless experience from start to finish. They want a single conversation that covers everything from discovering products to making purchases and getting support.

By combining automation and human agents, you can provide a personal touch at a large scale.

## Messaging is intuitively conversational

In a channel that invites dialogue, get closer to your customers with two-way conversations that deliver the intimacy of a phone call at the scale of email and SMS.

79%

of online adults message with a business at least once a week

77%

of online adults say they feel more connected with a business when they can message them directly

71%

of online adults say they are more likely to do business with / purchase from a company that they can contact via messaging



# Performance for businesses

93%

Businesses experienced increased top line revenue\*

90%

Businesses experienced increased conversion rates\*

95%

Businesses experienced improved customer experience\*



\*Compared to Legacy Channels

SOURCE: “The Total Economic Impact™ Of WhatsApp Business Platform For Marketing and Sales, a commissioned study conducted by Forrester Consulting, February 2023”. **Results are for composite organization based on interviewed customers.** \*Legacy channels include including SMS, email, their own apps and websites, and non-Meta messaging apps

# Quality and relevance are critical to a successful strategy

Businesses should prioritize sending messages that have **clear value** to customers and they should avoid non-relevant, impersonal outreach.

Relevant messages are more **likely to be read**, and they have the potential to yield more **engaged prospects and customers**.



The WhatsApp Business Platform is designed to provide **valuable experiences** for people



# We use a number of features to help maintain high-quality conversations



**User controls** that put people in control of their messaging experiences with businesses.



**Quality ratings** indicating how you are delivering on conversational quality.



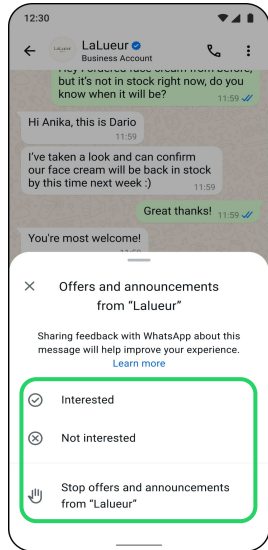
**Template pausing and disabling** for low-quality templates



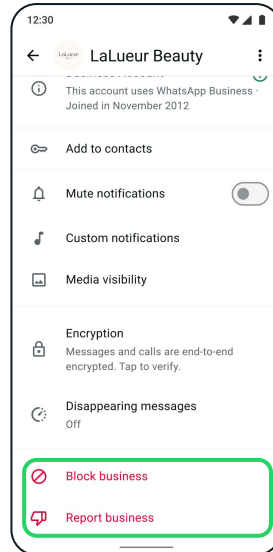
**Messaging limits** determining how many unique users you can send messages to

# People have control when they message businesses on WhatsApp

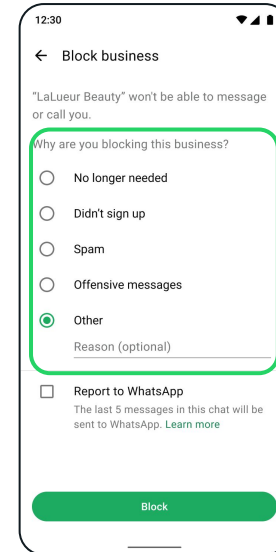
We leverage these and other quality signals to determine quality rating and we review user-reported content for policy violations.



People can **share feedback or stop receiving** marketing messages from businesses



People can **block or report** a business at any time



When people block a business, they also can choose to **tell us why**

# Businesses that focus on high-value conversations see many benefits



Build **long-term relationships** with customers and drive desired **business outcomes**



**Save costs** and increase ROI by reducing unnecessary spending



Reduce the risk of **customer blocks** and WhatsApp placing **limits** on the ability to reach customers



SECTION 2

# Lay Foundations for Success

✓ WhatsApp Business Account set-up

Platform integration

Campaign planning



# WhatsApp Business Account overview and considerations

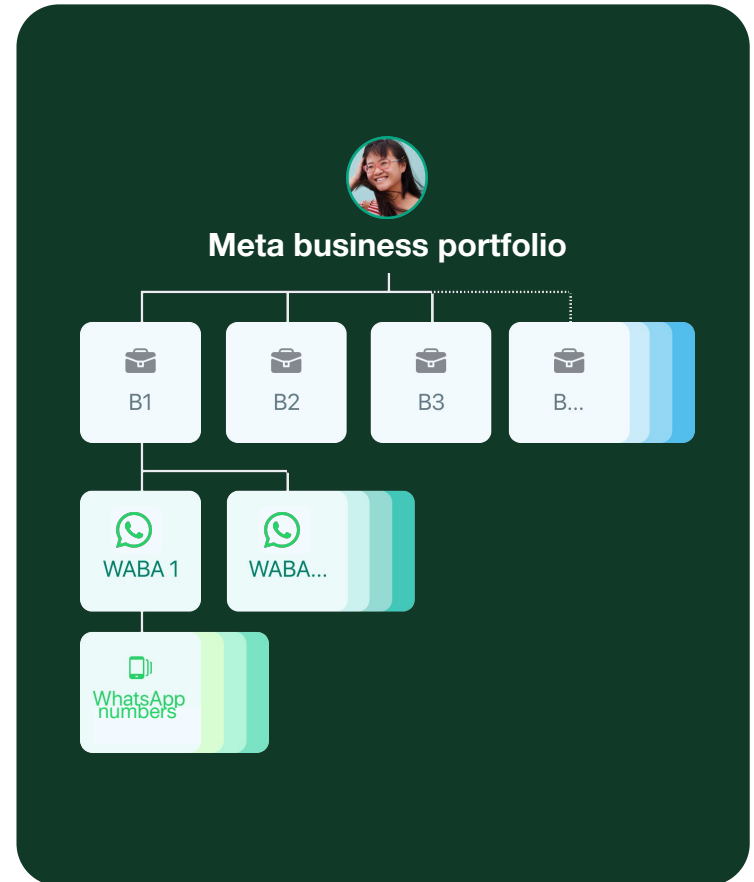
## The WhatsApp Business Account model

Your WhatsApp Business Account is central to the business messaging experience - phone number, template, Flows and Catalog management exist at this level.

- A business may create multiple Meta business portfolios
- Each business portfolio may have one or more WhatsApp Business Accounts
- Each WhatsApp Business Account may have multiple phone numbers

## Considerations to keep in mind

- **Limiting your number of WhatsApp Business Accounts** allows for consolidated insights and ease of management
- **Minimizing the number of phone numbers in use** allows people to enjoy a single persistent thread with your business
- **Linking your product catalog** will allow you to send single and multi-product messages to your customers



SECTION 2

# Lay Foundations for Success

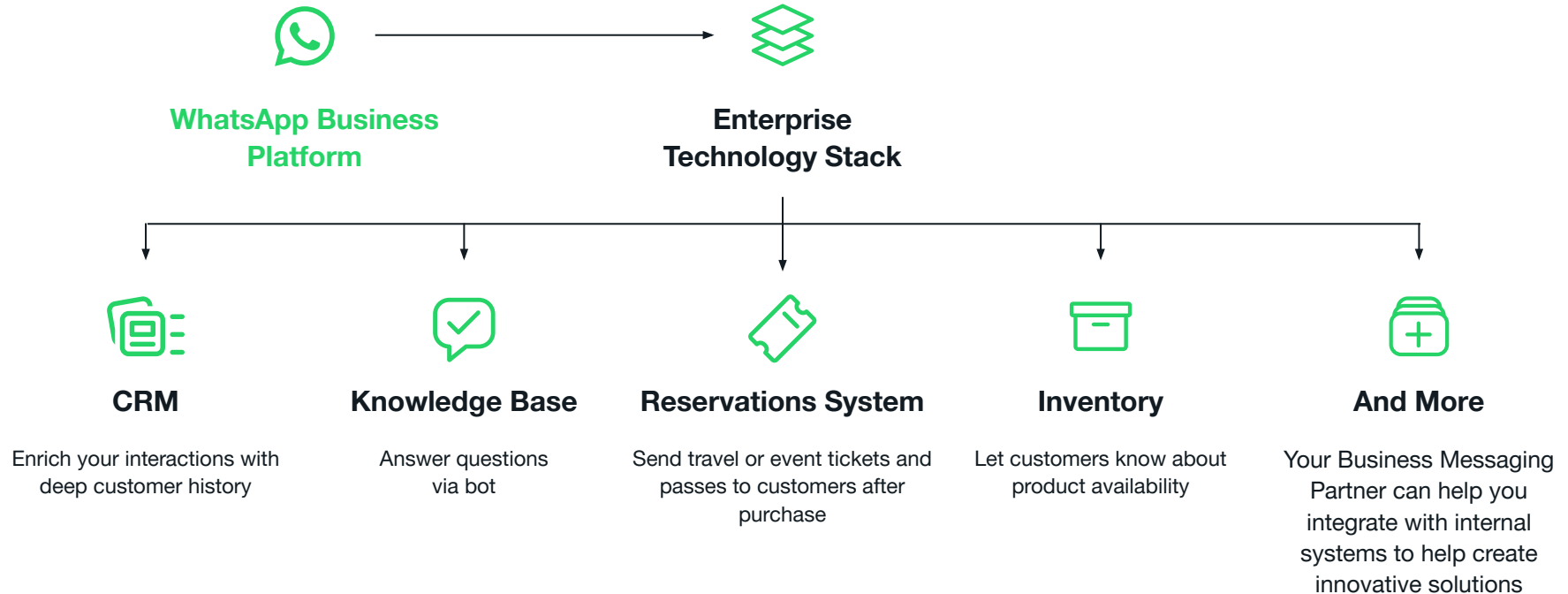
WhatsApp Business Account set-up

✓ Platform integration

Campaign planning



# Connect WhatsApp with your enterprise technology stack for richer experiences to strengthen your customer relationships



SECTION 2

# Lay Foundations for Success

WhatsApp Business Account set-up

Platform integration

✓ Campaign planning



# Maximize success with campaign planning best practices

- **Plan ahead:** Map out key seasonal and business moments and consider how marketing messages might be used to support and leverage these moments.
- **Integrate:** Consider how marketing messages can support broader marketing campaigns.
- **Coordinate:** A centralized strategy and governance can help ensure customers are not overloaded and receiving disjointed messages from different teams.
- **Keep customer experience at the core:** Think about how your customers will perceive your messages and what might appeal to them, drive loyalty, and favorable brand perception.
- **Provide end-to-end experiences:** Nurture customer relationships by providing ongoing support and complementary information and offers in one persistent thread.
- **Test and review:** Test different strategies and review results at regular intervals against clearly defined KPIs to determine what is working well and what can be improved.

SECTION 3

## Create High-Quality Experiences

✓ Audience engagement

Creative excellence

Quality, insights and measurement



# To deliver **high-quality** experiences, messages should be **expected, timely, and relevant**

What makes for high-quality messages?



People have **already opted in to receive this information\***



Customers **receive these messages at a logical time** (e.g., soon after engaging with the business, at a requested cadence)



The messages are **personalized** to the customer, contain **valuable information**, and outline **clear call to action(s)** for the customer

\* Note: WhatsApp specific opt-in consent is no longer required. [Learn more](#)

# To ensure messages are expected, businesses must obtain opt-in in advance

Our Business Policy requires the following:

## 01

Businesses must clearly state that a person is opting-in to receive messages from the business

## 02

Businesses must clearly state the business' name that a person is opting-in to receive messages from

## 03

Businesses must comply with local laws and regulations regarding notices, permissions and consent

**EXPECTED**

# Creating a seamless opt-in experience

It's important to optimize your opt-in flows to ensure people have positive experiences with your business.

- **Clearly communicate the value** of receiving important updates on WhatsApp
- **Users should expect the messages they receive**
  - Obtain an opt-in that clearly reflects the type of messages that you intend to send (ex: order updates, relevant offers, etc.)
  - Ask for explicit consent for promotional messages: Do not bundle with other types of communications (e.g. transaction updates), helping to mitigate the risk of users blocking your business because they perceive your messages as unsolicited
- **Wherever you collect consent, ensure that your opt-in flows are clear and intuitive**
- **Actively monitor and respect all requests** (either on or off WhatsApp) by a person to block, discontinue, or otherwise opt out of communications from you via WhatsApp—**including removing that person from your contacts list**
- **Monitor your quality rating**, especially when rolling out new opt-in methods (available in WhatsApp Manager and via WhatsApp Business Manager [API](#))

\* Note: WhatsApp specific opt-in consent is no longer required. [Learn more](#)

# Collect opt-in wherever is best for your customers

## EXAMPLE METHODS

On your website

SMS short code

Customer service call

Phone interactive voice response (IVR)

QR code

In-person

During the transaction process

Messenger bot

Ads that click to WhatsApp

In a WhatsApp thread



Always be transparent when collecting opt-ins from people about the types of updates you will send them

\* Note: WhatsApp specific opt-in consent is no longer required. [Learn more](#)

**TIMELY**

# Ensure your messages are timely but not too frequent

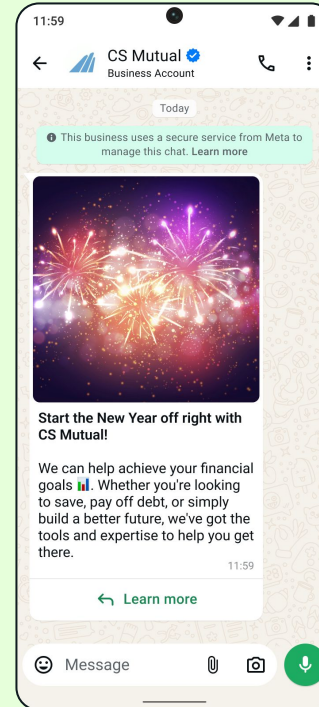
Establishing when and how often people will most want to hear from your business is one of the most critical factors for a successful strategy.



## TIMELY

# Timing and frequency best practices

- Consider your customers and **evaluate the most suitable time** to reach out to them, like lining up relevant marketing messages with **key seasonal or business moments**
- To maximize chances of engagement, **consider when *not* to send messages**, e.g. when people might be offline or on days when many businesses are competing for your customers' attention
- **Monitor how many marketing conversations a customer receives** per day and per week to avoid overload
- **Avoid excessive promotional messages:** Users are likely to be frustrated by and more inclined to block or report promotional messages sent too frequently or from too many phone numbers
- **Cool downs:** Monitor your read rates and give customers that have stopped engaging with your templates a break



## RELEVANT

# Make it relevant and personal

Make your marketing messages personal by ensuring the message speaks to the consumer on their level and is relevant to their specific needs.



**Segment your audience** based on what they are most likely to be interested in.



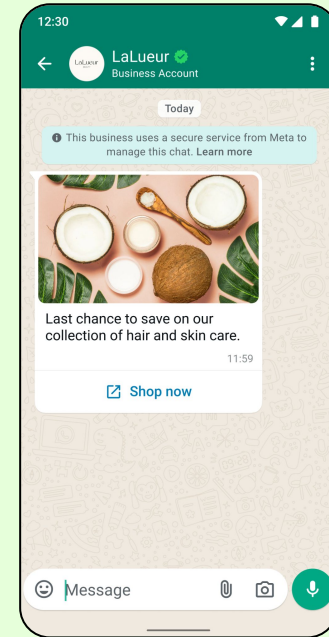
**Tailor your message** for each segment. For instance, include additional information related to a product browsed or viewed, or offer incentives to complete a transaction.



**Include complementary information**, add-on products, features, or upgrades that relate to previous purchases or services used.



**Combine and connect your marketing messages with other types of messages** such as account updates to provide even more value and deepen your relationship with customers.



**RELEVANT**

# Include incentives to nurture relationships and drive action

Offer compelling rewards such as exclusive discounts, free samples, complimentary delivery or exclusive access to motivate people and foster loyalty



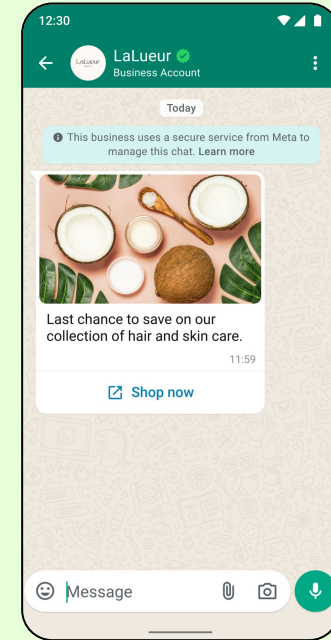
Where possible **make the offer personal** based on customers' interests, past purchases, special dates etc.



**Reference more competitive pricing** online than offline and include promotional incentives when appropriate to drive purchases.



**Clearly explain the user benefit** with context so users understand the offer, how it works, the expiration date, etc.



## RELEVANT

# Emphasize quality and trust

Establish trust and reassure consumers by clearly showing you are a highly trusted, quality business with strong consumer protections in place.

**Remove spammy signals:**

Make sure messages relate to a given image, removing embedded links, typos, etc.



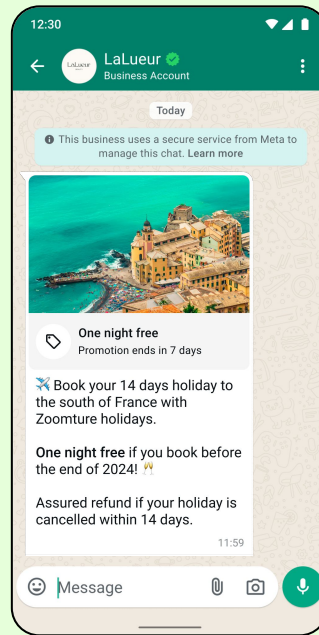
**Reference product selection and quality** in images or copy.



**Emphasize message clarity** with simple language in shorter sentences. Make sure the message is actionable and focused.



**Reference delivery quality, service and payment protections** such as easy support and returns, or cash on delivery payment.



SECTION 3

## Create High-Quality Experiences

Audience engagement

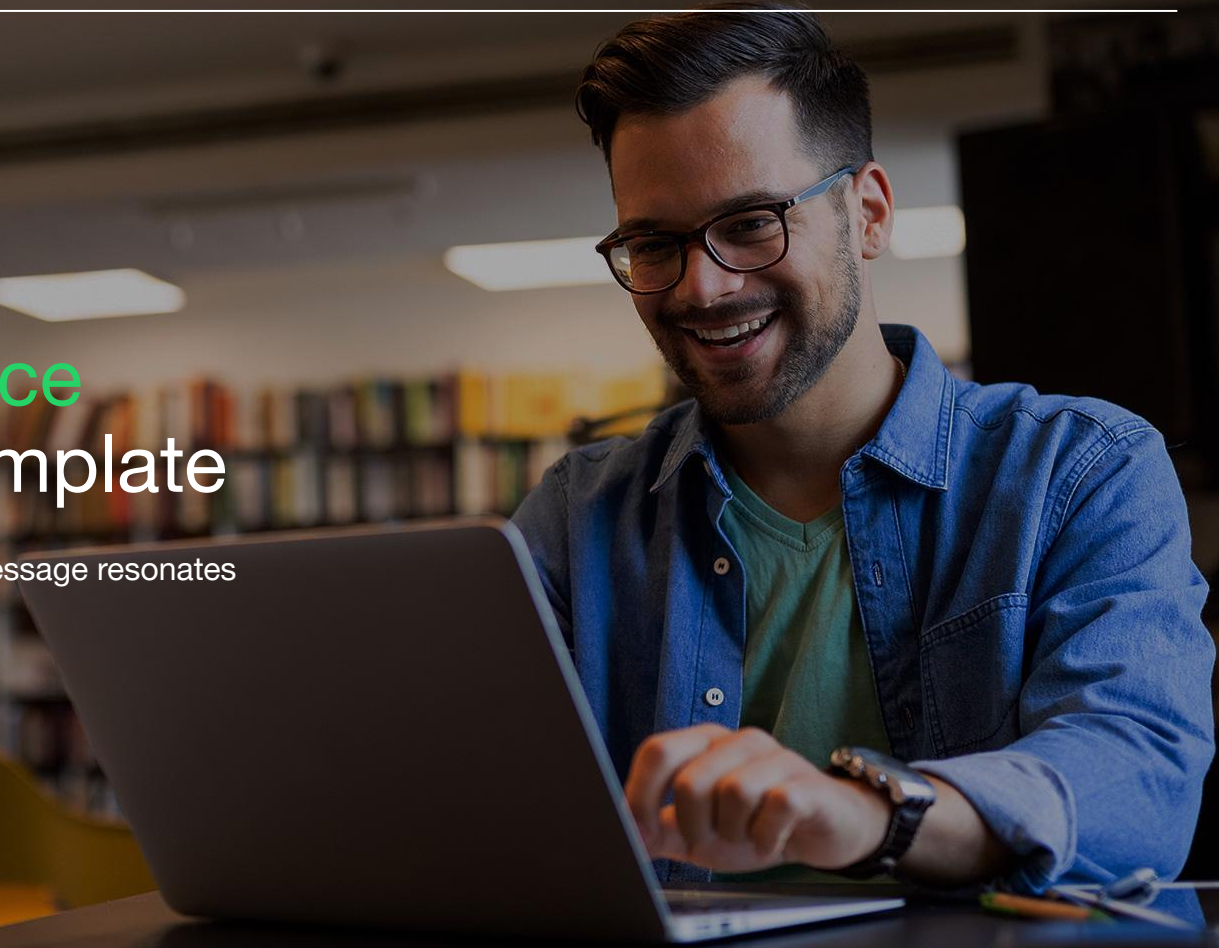
✓ Creative excellence

Quality, insights and measurement



# Creative excellence starts with the template

Optimize your templates to ensure your message resonates



# Strike the right tone

## Warm and personal

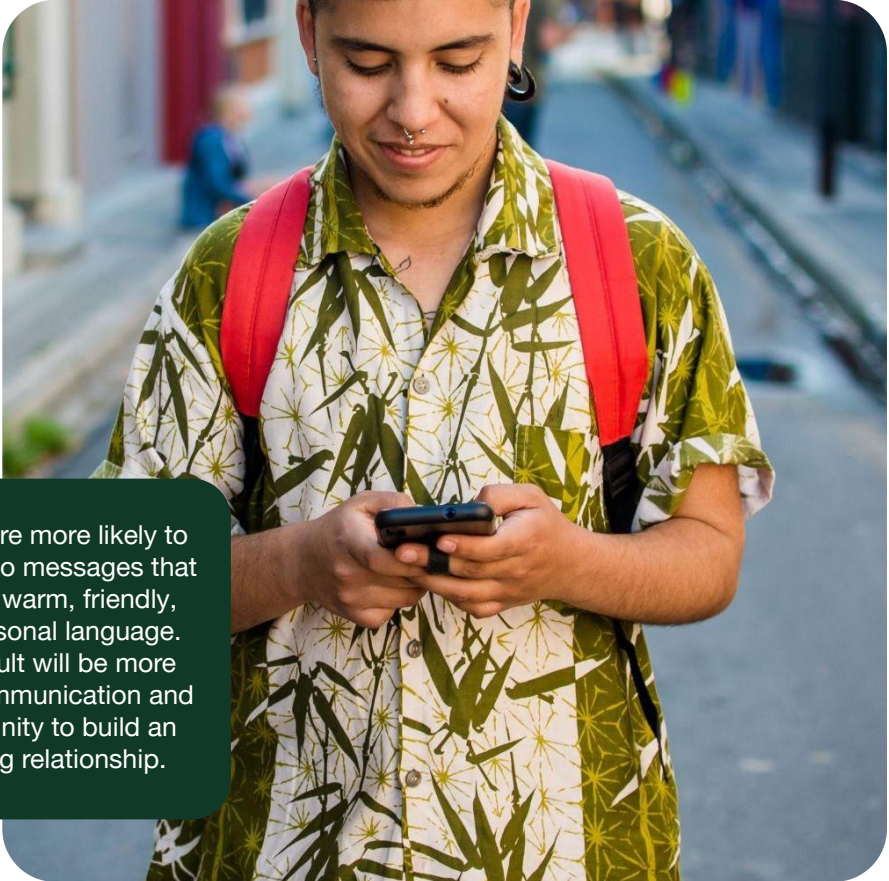
Starting with a first name helps build rapport and legitimacy, as well as promising a more personal customized service experience and quick response time.

## Grammatically correct and well-written

Crafting the message with care shows the reader that this message has been considered and reviewed.

## Encouraging and informative, not pushy

Ensure the message doesn't feel like a targeted sales pitch. Approach it like you are building a longer term relationship.



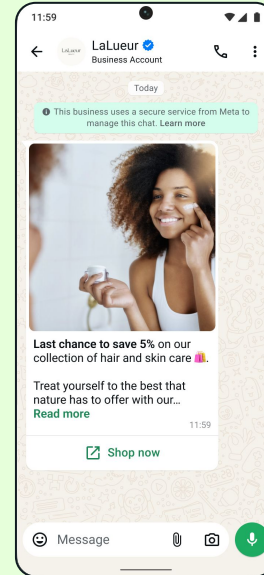
People are more likely to respond to messages that contain warm, friendly, and personal language. The result will be more open communication and opportunity to build an ongoing relationship.

# Anatomy of a poorly-crafted marketing template

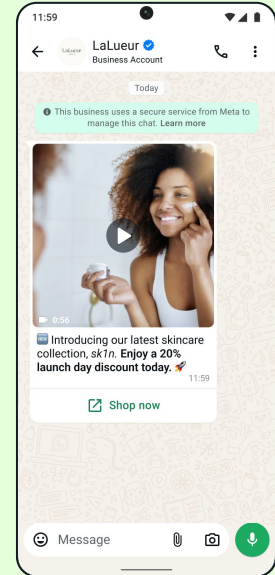


# Anatomy of a well-crafted marketing template

- Keep your message **focused and concise**. **Highlight and bold important information** ideally at start of message.
- **Optimize the first 5 lines**. Messages with more than 5 lines are automatically truncated. People can click 'read more' to see additional text.
- **If using > 5 lines, use separate sections clearly spaced apart**. Avoid more than 3-4 sections and too much white space.
- Consider **selective use of emojis** that match the context and enhance your tone. Refrain from using an excessive number.
- **Use CTA buttons to link to a website** rather than including URLs in the message
- **Images should be self-explanatory** and not dependent on text. At the same time, the text should also be clear even if the media isn't downloaded.
- **Refresh your templates** every few weeks to prevent creative fatigue.

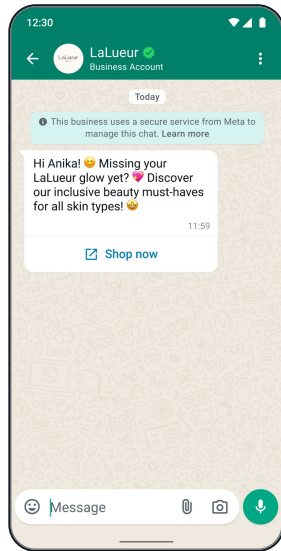


Front load important information as messages with > 5 lines are automatically truncated

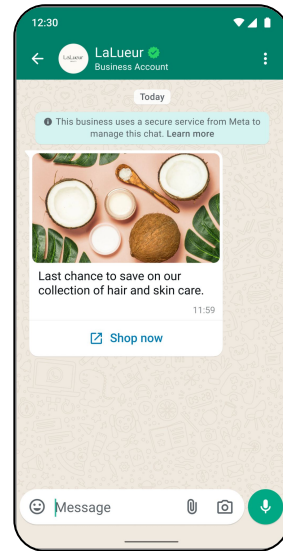


Less is more! Where possible, keep messages focused and concise

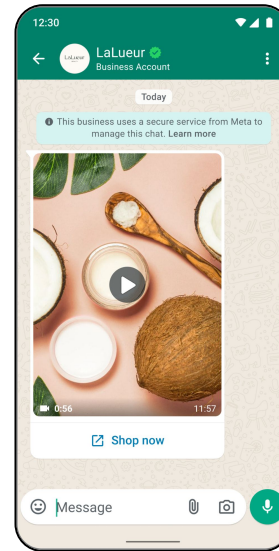
# Test different media types to understand optimal formats per audience and message



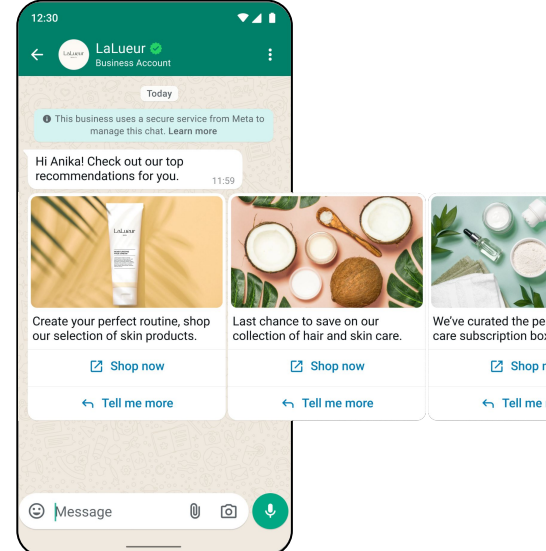
Text only



Single Image Wide (12:7)



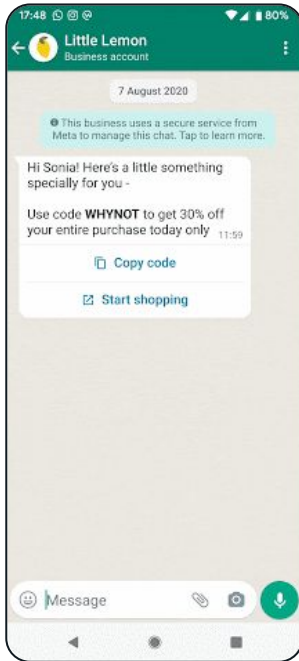
Video Portrait (5:7)



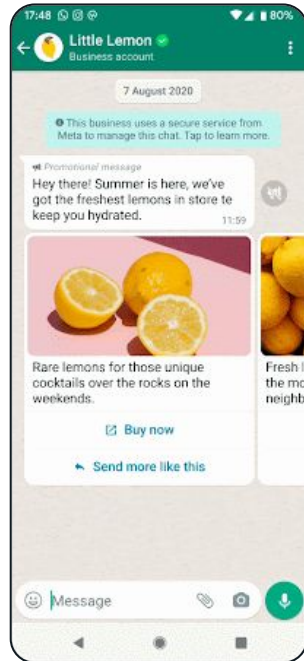
Carousel (17:10)

# Remove friction with native messaging formats

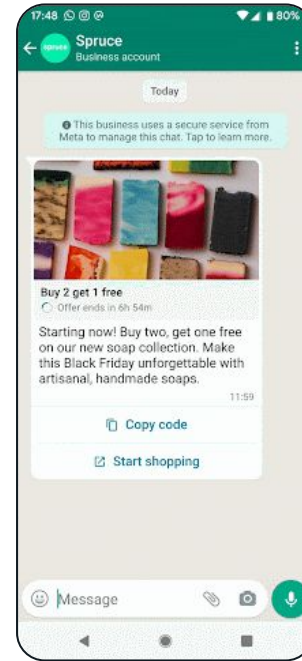
Consider native button types and marketing templates to seamlessly drive engagement and conversions.



Call-to-Action  
and Copy  
Coupon  
Code Buttons



Carousel



Limited Time  
Offer

# Follow these tips for template reviews

- Plan in advance to account for review times.
- Content should comply with our [Commerce](#) and [Business](#) policies.
- Templates must be formatted correctly according to WhatsApp's [guidelines](#).
- For faster turnaround and to ensure there is enough context during review, we highly recommend including a sample.
- This is especially true when submitting a media message template.
- All appeals for rejected message templates require a sample. You can appeal a rejected message template through [Direct Support](#).
- If the same template will be sent in multiple languages, here are tips to ensure a seamless review:
  - If template is created in Business Manager: create one template and add the other desired languages.
  - If template is created via API: submit templates with the same name but change the language when submitting.

SECTION 3

## Create High-Quality Experiences

Audience engagement

Creative excellence

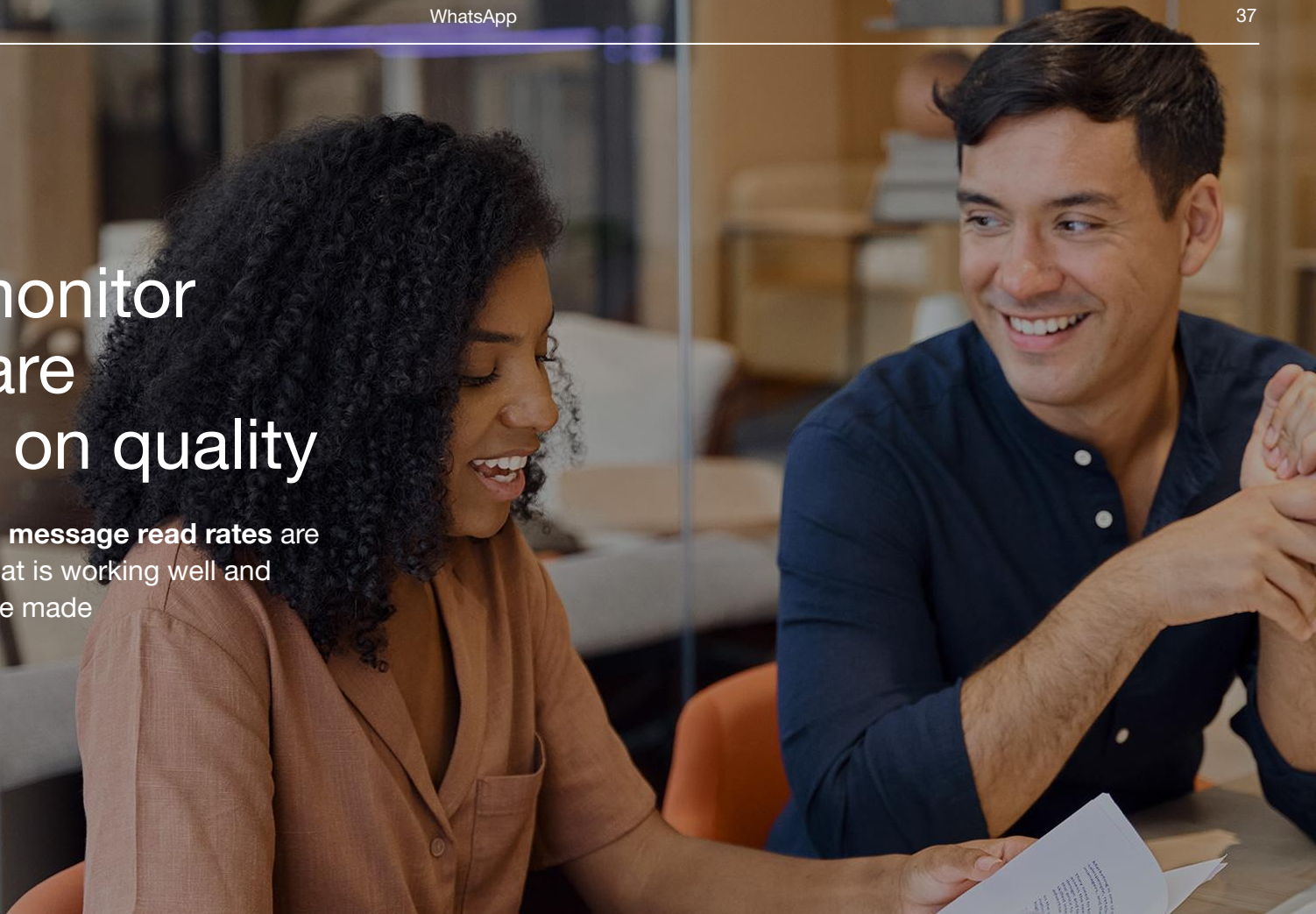


Quality, insights and measurement



# Actively monitor how you are delivering on quality

Your **quality ratings** and **message read rates** are key to understanding what is working well and where changes should be made



# Assess your quality in WhatsApp Manager

A standalone interface inside the Meta Business Suite


The screenshot displays the WhatsApp Manager interface for a message template. The top navigation bar shows 'Message templates > Template insights'. The template name is 'Exclusive\_offer\_summer\_sale' in English (US), with a status of 'Active • High quality' and a category of 'Marketing', last updated on June 26, 2024. The selected time period is 'Last 7 days (EST): Aug 5 - Aug 12, 2024'. Three key performance indicators are shown: Amount spent at \$42.50, Cost per message delivered at \$0.15, and Cost per click at \$0.35. The 'Your template' section features a food-related image and text: 'Hey {{Name}}, You can learn to cook like a professional chef with our new courses and exclusive meal kits, shipped directly to your door. You have a voucher waiting for you in your wallet. Hurry, offer ends soon: checkout before May 28th!' with a 'Shop now' button. The 'Performance' section includes a line chart and three data points: Messages sent (950, up 10%), Messages delivered (804, up 10%), and Messages read (418, down 10%).

**Message templates > Template insights**

**Exclusive\_offer\_summer\_sale** • English (US)  
Active • High quality • Marketing • Updated Jun 26, 2024

Last 7 days (EST): Aug 5 - Aug 12, 2024 | Edit template

**Your template**



Hey {{Name}},

You can learn to cook like a professional chef with our new courses and exclusive meal kits, shipped directly to your door.

You have a voucher waiting for you in your wallet. Hurry, offer ends soon: checkout before May 28th!

[Shop now](#)

**Performance**

Messages sent: 950 ↑ 10%

Messages delivered: 804 ↑ 10%

Messages read: 418 ↓ 10%

Amount spent: \$42.50

Cost per message delivered: \$0.15

Cost per click: \$0.35

# Phone numbers tab

View important information about your business numbers:

- Status
- Quality rating
- Messaging limits
- Quality rating over past 30 days (by clicking on the icon in the settings column)

The screenshot shows the WhatsApp Manager interface for 'LaLuer Beauty'. The 'Phone numbers' tab is selected in the left sidebar. The main content area displays a table of phone numbers with the following data:

Phone number	Name	Status	Quality Rating	Messaging Limit
+1 555-010-0121 United States	LaLuer Beauty Bot	Connected	High	250 Customers/24hr
+1 555-010-0122 United States	LaLuer Beauty	Connected	High	1000 Customers/24hr
+1 555-010-0123 United States	LaLuer Beauty HQ Name in review	Connected	High	1000 Customers/24hr
+1 555-010-0124 United States	LaLuer Support	Connected	Unavailable	Unavailable

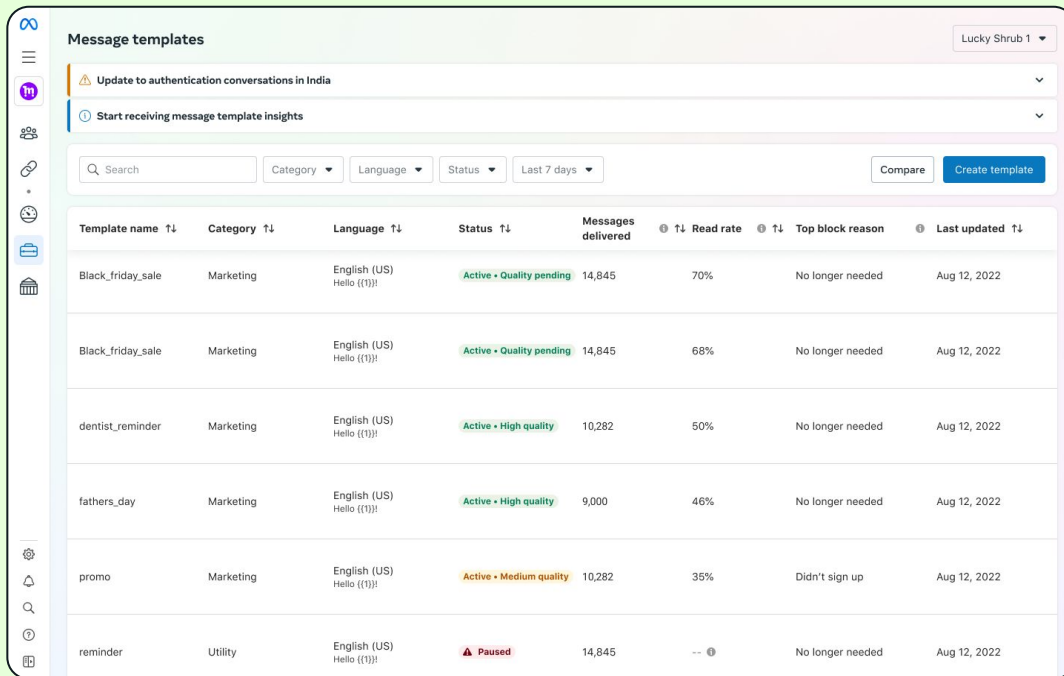
Below the table, it states: 'You have 4 production numbers (max: 25)'. A green box highlights the 'Quality Rating' column, and a line points to the text 'Quality rating' below the table.

Quality signals can also be monitored via WhatsApp Business Manager [API](#)

# Message templates tab

Monitor how your message templates are performing:

- Template status and quality rating
- Messages delivered
- Message read rate
- Top block reason



Message templates

Update to authentication conversations in India

Start receiving message template insights

Search Category Language Status Last 7 days Compare Create template

Template name	Category	Language	Status	Messages delivered	Read rate	Top block reason	Last updated
Black_friday_sale	Marketing	English (US) Hello {{1}}!	Active • Quality pending	14,845	70%	No longer needed	Aug 12, 2022
Black_friday_sale	Marketing	English (US) Hello {{1}}!	Active • Quality pending	14,845	68%	No longer needed	Aug 12, 2022
dentist_reminder	Marketing	English (US) Hello {{1}}!	Active • High quality	10,282	50%	No longer needed	Aug 12, 2022
fathers_day	Marketing	English (US) Hello {{1}}!	Active • High quality	9,000	46%	No longer needed	Aug 12, 2022
promo	Marketing	English (US) Hello {{1}}!	Active • Medium quality	10,282	35%	Didn't sign up	Aug 12, 2022
reminder	Utility	English (US) Hello {{1}}!	Paused	14,845	--	No longer needed	Aug 12, 2022

Quality signals can also be monitored via WhatsApp Business Manager [API](#)

# Template insights

Deep dive on how your messages are resonating with customers, with available metrics\* including:

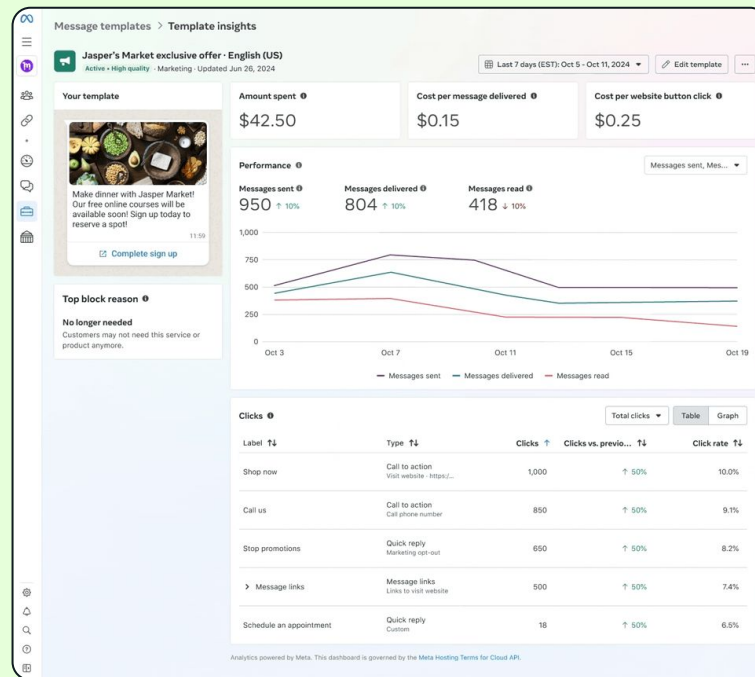
- Messages sent | delivered
- Message/template read rate
- Quick reply button clicks
- CTA website button clicks\*\*
- Top block reasons
- Cost metrics\*\*\*

Template analytics are also available via WhatsApp Business Manager [API](#)

\* Template engagement metrics available to Cloud API businesses in all markets except EU, UK and JP.

\*\* Button click engagement metrics available for marketing message type only.

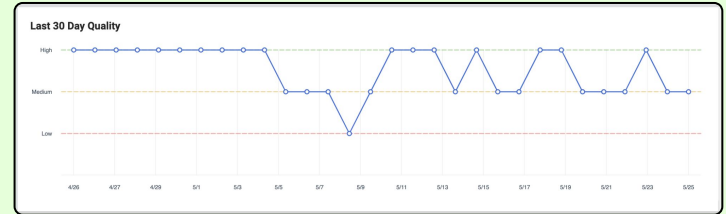
\*\*\* Cost metrics available to partners and direct clients, and not partner-managed clients.



# Investigating quality

Maintain high quality with these proactive tips:

- ➔ Review the 30-day quality history chart and quality reasons provided to help pinpoint quality drops and potential reasons why.
- ➔ Determine if send volumes have increased for specific templates or if new templates have recently been added. All messages should be expected, timely, and relevant.
- ➔ Dive into other types of metrics your business may be gathering, like customer satisfaction, to better understand if there has been a change in sentiment.
- ➔ Review bot functionality to ensure the bot is working as expected and users' inquiries can be adequately resolved.
- ➔ Experiment with a single new use case at a time, gradually ramping up volumes to the desired level and then monitor phone number and template warnings over 7-10 days.
- ➔ If you receive a warning, re-evaluate the use case, outreach strategy, opt-in flows, and message content.
- ➔ Ensure all messages comply with our Commerce and Business policies.



30-day quality history

Phone Number	Status	Quality Rating	Messaging Limit	Country
+1 650-555-0604	Pending	Unavailable	Unavailable	United States
+1 650-555-0062	Offline	High	1K Customers/24hr	United States
+1 631-555-5025	Connected	High	Not Applicable	United States
+1 650-555-8206	Connected	Medium	Not Applicable	United States
+1 650-555-5324	Connected	High	Not Applicable	United States
+1 650-555-4800	Flagged	Low		United States

This phone number is sending low quality message templates. You can view your templates for more information.

Users are choosing "I don't sign up" as a reason for blocking this phone number. Businesses must obtain opt-in before sending notifications. Please review your opt-in flow(s) and see our Business Policy for more detail.

Users are choosing "offensive messages" as a reason for blocking this phone number. Please immediately remove offensive content in your conversations with users, including user-initiated messaging and/or templates.

[Learn More](#)

Quality reasons

# Measure business outcomes across the customer lifecycle and ROI

Businesses can understand the incremental impact of their marketing messages by implementing a strong measurement framework.

## How to get started:

1. Engage a third-party analytics service or (if you have the resources) build an in-house solution
2. Map key conversion events both in-thread and off-thread across the customer lifecycle
3. Work with technical or analytics teams to implement attribution logic and data visualization
4. Build and implement a testing agenda to:
  - Understand the incremental impact of marketing messages
  - Benchmark against other channels
  - A/B test different campaign strategies

SECTION 4

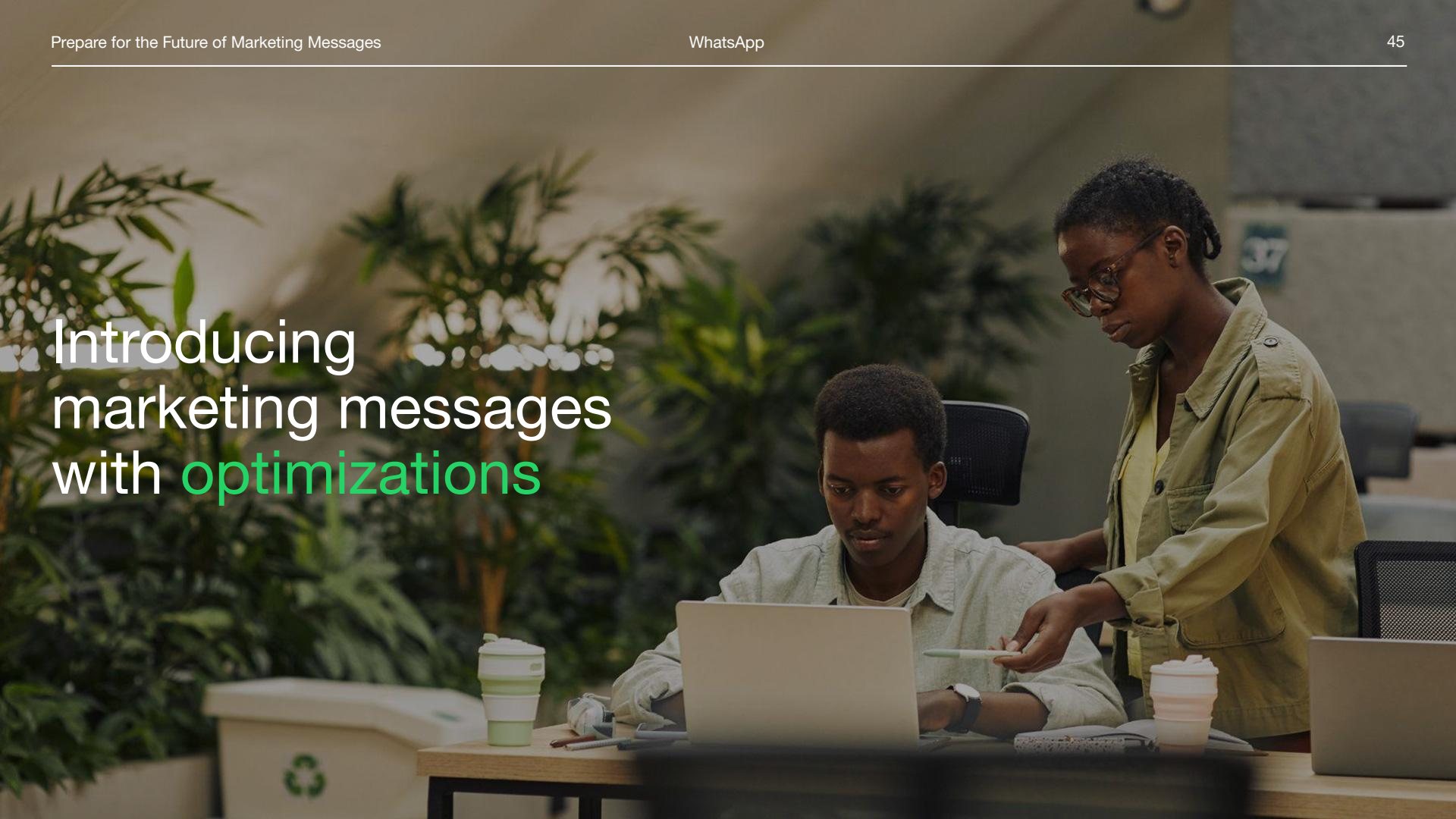
# Prepare for the Future of Marketing Messages

- ✓ Marketing messages with optimizations

New metrics and tools



# Introducing marketing messages with optimizations



# New **optimizations** help marketing messages drive more value for businesses and your customers

Non-optimized marketing messages have allowed businesses to send a specific template to a specific person.

Now, with optimizations, you can still send a specific template to a specific person.\* But, marketing messages with optimizations are automatically optimized for deliveries and reads, so people will get more of the messages they want from the businesses they actually want to hear from.

This delivers a **higher quality experience for customers and better business performance** compared to non-optimized marketing messages.



\*Note: Same as marketing on Cloud API, messages sent using MM Lite API may not be delivered due to quality and integrity checks (e.g., user block, spam filters, template pausing due to high negative feedback rate, per-user marketing template message limits). However, with MM Lite API, businesses can benefit from better delivery rates (or neutral), and better read and click rates compared to Cloud API.

# With optimizations, it's easier than ever to personally engage with customers and build lasting relationships at scale

## Deliver the right message to the right person on WhatsApp.



### Drive Business Results

Build on the strength of our AI systems to deliver your messages to customers who will find them valuable and be more likely to engage.



### Understand Performance

Measure impact across channels with web and app conversion reporting and exclusive measurement insights (e.g., benchmarks, recommendations), among other new features.



### Save Time and Cost

It's easy to onboard to marketing messages with optimizations. Then simply send a message, and Meta automates the optimization.

SECTION 4

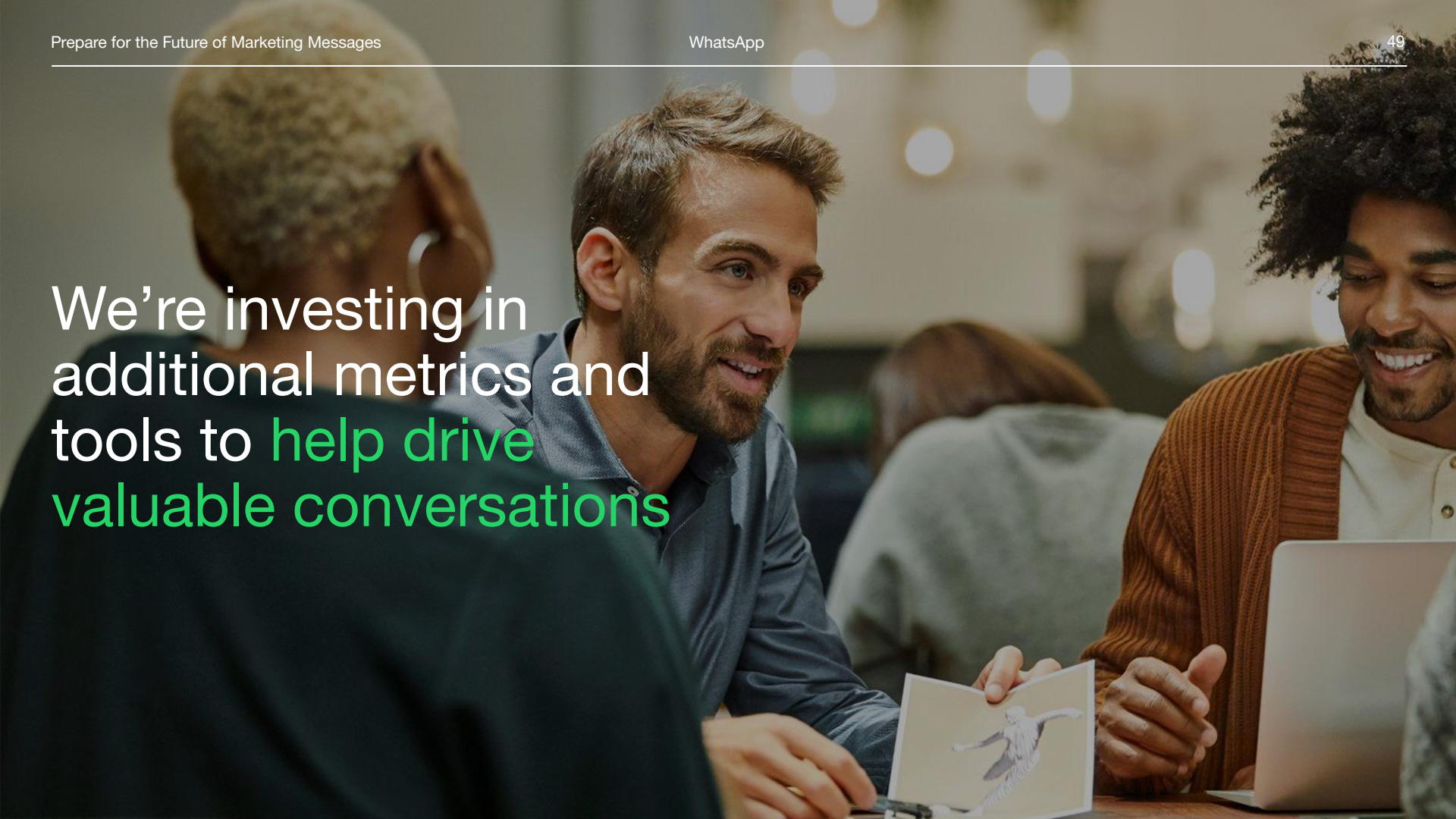
# Prepare for the Future of Marketing Messages

Marketing messages with optimizations

- ✓ New metrics and tools



















We're investing in additional metrics and tools to help drive valuable conversations



# Optimized Marketing Messages vs. Non-Optimized

Legend:  New  Same as non-optimized

	Non-optimized marketing messages	Marketing Messages with Optimizations
<b>Performance Optimizations</b>	None	<ul style="list-style-type: none"> <li> Equal or higher <b>delivery rates</b> than Cloud (<i>available now</i>)</li> <li> Equal or higher <b>read and click rates</b> than Cloud</li> </ul>
<b>Measurement &amp; Reporting</b>	Sent, Delivered, Read, Clicked Cost metrics (e.g. cost-per-click)	<ul style="list-style-type: none"> <li> Sent, Delivered, Read, Clicked</li> <li> Cost metrics (e.g. cost-per-click)</li> <li> <b>Web conversions</b> (e.g. add to cart, purchase) (<i>avail. now</i>)</li> <li> <b>App conversions</b> (<i>avail. now</i>)</li> <li> <b>Exclusive insights</b> (e.g. benchmarks, recommendations)</li> </ul>
<b>Features</b>	Standard Cloud API marketing feature set	<ul style="list-style-type: none"> <li> Standard Cloud API marketing feature set</li> <li> <b>Exclusive marketing features</b> (e.g. time-to-live for marketing messages) (<i>TTL avail. now</i>)</li> <li> <b>App deep links in marketing messages</b> (<i>avail. now</i>)</li> <li> <b>Exclusive new creative formats</b></li> </ul>
<b>Onboarding</b>	For new businesses: <ul style="list-style-type: none"> <li>• Direct registration</li> <li>• Partner-facilitated, via Embedded Signup</li> </ul>	<ul style="list-style-type: none"> <li> For new businesses: Self-registration or via Embedded Signup (via Partner) <ul style="list-style-type: none"> <li>• Direct registration</li> <li>• Partner-facilitated, via Embedded Signup</li> </ul> </li> <li> <b>Partner can trigger upgrade to MM Lite notifications for business onboarding in WhatsApp Business Manager</b> (<i>avail. now</i>)</li> </ul>
<b>Business data used for optimizations</b>	User phone number: for delivery only	<ul style="list-style-type: none"> <li> User phone number: for delivery only</li> <li> <b>Outgoing messages &amp; msg templates: to power optimizations</b></li> <li> <b>Delivery &amp; read events: to power optimizations</b> (<i>avail. now</i>)</li> </ul>

# Key Takeaways



# Maximize your marketing message strategy by following these best practices



## Lay foundations for success

- Optimize your **WhatsApp Business Account set-up**
- **Integrate with your tech stack** for richer experiences
- **Plan and coordinate campaigns carefully** with a focus customer experience
- **Nurture relationships by providing end-to-end experiences** including post transaction support and complementary offers in one persistent thread



## Create high-quality experiences

- Ensure your messages are **expected, timely, and relevant**, and always provide **clear opt-in options**
- To optimize your templates, **follow creative best practices** and leverage **native and interactive components**
- **Monitor quality ratings and engagement metrics and take action** where marketing messages are not resonating with your audience
- Implement measurement **across the customer lifecycle** and measure ROI
- **Continuously test, evaluate, and optimize** your marketing message strategy



## Prepare for the future of marketing messages

- Reach out to your **Business Messaging Partner or account team** for more information on marketing messages with optimizations if it's available in your market
- **Stay tuned for additional metrics**, insights and testing tools to help further refine your strategy

# Do more with conversations with marketing messages on WhatsApp

Re-engage your customers with high-value messaging experiences that help drive sales, build loyalty, and deepen relationships. Deliver the right message at the right time, right where they want to hear from you.

To get started, connect with your Business Messaging Partner, or [find a partner](#) today.

