

Onboarding to the WhatsApp Business Platform



What to expect

Welcome to the WhatsApp Business Platform onboarding process!

As your business begins leveraging the WhatsApp Business Platform, it's crucial to understand the onboarding process, the paramount need for creating quality experiences, and the vital role played by your business messaging partner in ensuring your success.

This guide outlines what to expect during onboarding, highlighting the importance of message quality, the technical steps involved, and the support you can expect to receive. By establishing high standards of quality from the start, you'll maximize potential to connect with your customers in ways that foster your business goals.

Our shared objective is to help you create expected, timely, and relevant interactions that ensure a positive customer experience while driving business growth.

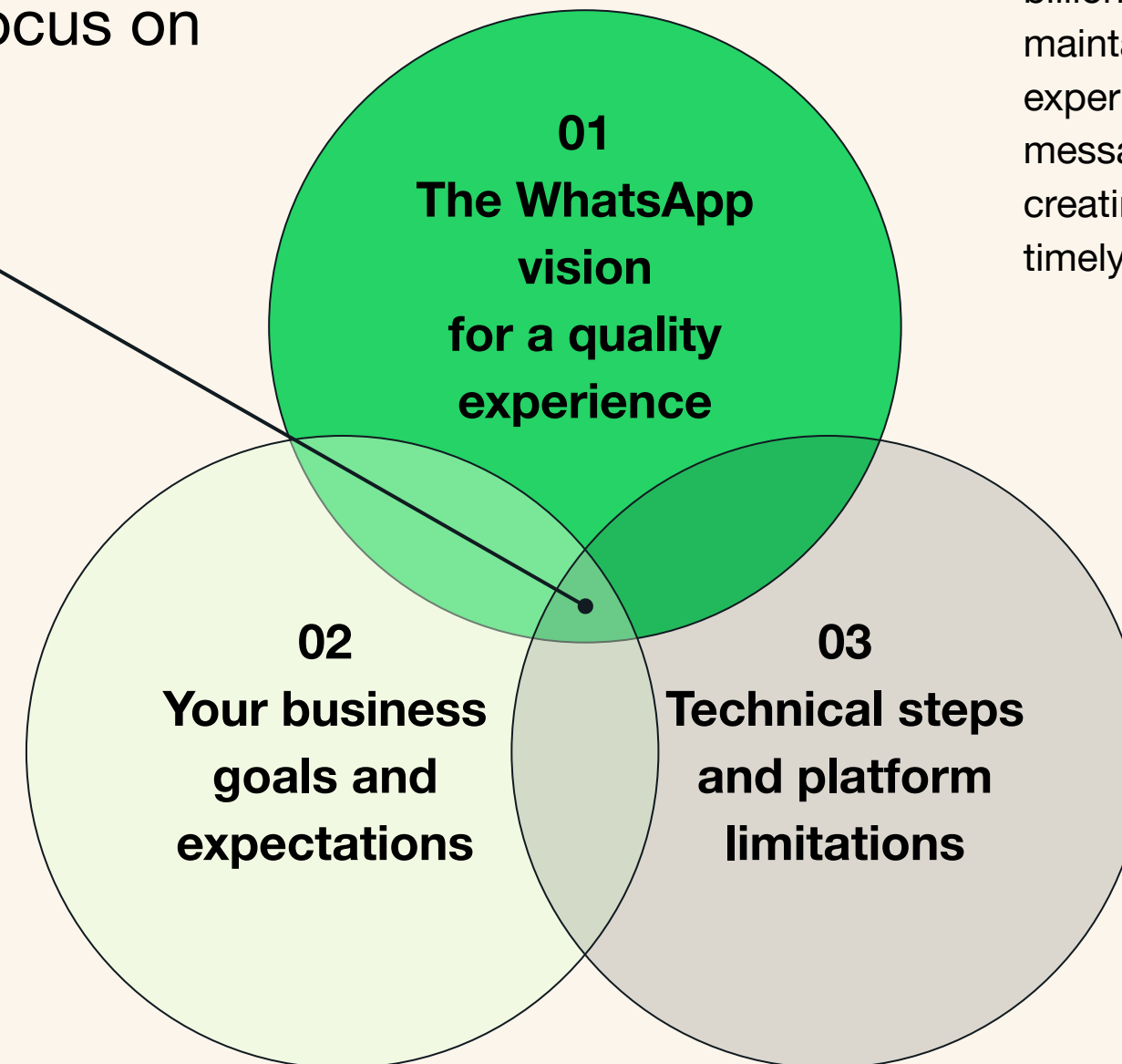


Successful onboarding

To ensure smooth and effective onboarding to the WhatsApp Business Platform, focus on **three key themes:**

Successful onboarding!

Each business has unique goals for messaging. Aligning these goals with the platform's gradual message scaling is crucial. Your business messaging partner will help plan your strategy, ensuring you understand initial limits, designed to protect the customer experience, and how to scale them.



WhatsApp is a personal space used by billions of people worldwide, and maintaining a high-quality messaging experience is essential. Your business messaging partner will guide you in creating interactions that are expected, timely, and relevant.

Onboarding to WhatsApp Business Platform involves technical steps that ensure compliance with our policies. Your business messaging partner will guide you through setting up your WhatsApp Business account, integrating approved APIs, and managing message templates.

Each theme represents a critical aspect of the onboarding process that will help ensure your long-term success on the WhatsApp Business platform.

The onboarding flow in three stages

To ensure a successful onboarding experience with the WhatsApp Business Platform, we'll guide you through a structured, three-stage process. The approach focuses on building a strong foundation, learning from early interactions, and scaling your messaging efforts as you grow.

Onboard in three stages

Stage 01 Foundations

Before diving into the technical setup, it's essential to understand the foundational principles that will ensure your success with WhatsApp Business Platform. This stage is about educating around key concepts that will set the tone for all your future interactions with customers.

Stage 02 Test and learn

In this stage, you'll start sending messages to a limited number of customers to gather quality signals and refine your approach. This stage is about learning how your customers respond to your messages and ensuring you deliver the best possible experience.

Stage 03 Scale messaging

Once you've refined your approach and maintained high-quality interactions, you'll be ready to scale your messaging efforts. At this stage, you'll increase your message volume and expand your customer reach.

Stage 1: Foundations

Before diving into the technical setup, it's essential to understand the foundational principles that will ensure your success with WhatsApp Business Platform. This stage is about educating around key concepts that will set the tone for all your future interactions with customers.



Key focus areas:

01.

Understanding the importance of message quality

WhatsApp is a personal communication space and customers want messages from businesses to be expected, timely, and relevant. Your business messaging partner will help you understand what constitutes high-quality messaging and how to avoid pitfalls like being reported for spam or blocked by customers.

02.

Familiarizing with our policies

WhatsApp has strict rules governing business messaging to protect the user experience. It's important to become familiar with the [WhatsApp business messaging policy](#) early on, as violations could lead to account blocks or other limitations. Your business messaging partner will help you navigate these guidelines to ensure full compliance.

03.

Securing customer opt-ins

Gaining explicit consent from your customers before sending them messages is a critical step. Your business messaging partner will guide you on best practices for collecting opt-ins, ensuring that all communication is compliant and welcomed by recipients.

04.

Setting expectations for message limits and scaling

When you start messaging on WhatsApp, there are initial limits to how many messages you can send per day. These limits increase as you maintain high quality ratings. Understanding this gradual scaling process will inform your planning and align with the WhatsApp focus on quality over quantity.

05.

Understand phone number requirements

When setting up your WhatsApp Business account, your business must use a dedicated phone number that can receive voice calls or SMS for verification. This number must be in the correct international format, not previously used with the WhatsApp Business Platform, and it cannot be a toll-free or short code number. If your number is currently linked to a WhatsApp account, it must be removed before registration.

06.

Understand display name requirements*

Your display name is what customers will see during conversations and on your business profile, and it must accurately represent your business. It should match your external branding (e.g., website or marketing materials) and comply with the WhatsApp Commerce and Business policies. Ensuring consistency with your brand will help build trust with customers.

***Note:** Your display name will only be reviewed after the 'test and learn' stage, once you're eligible to scale message limits. However, you must submit a display name when setting up your WhatsApp Business Account, so be sure to follow the guidelines from the start.

Stage 2: Test and learn

In this stage, you'll start sending messages to a limited number of customers to gather quality signals and refine your approach. This stage is about learning how your customers respond to your messages and ensuring you deliver the best possible experience.



Key steps:

01.

Set up your WhatsApp Business account

You'll work with your business messaging partner to create your WhatsApp Business account, set up your business profile, and verify your phone number.

02.

Complete business verification

Business verification helps WhatsApp confirm that your business portfolio belongs to a legitimate business or organisation. Your business messaging partner will either complete this automatically or ask you to perform the steps manually.

03.

Use message templates

WhatsApp message templates allow businesses to send structured messages to customers who have opted to receive notifications. Your business messaging partner will help you create and adapt message templates that comply with the WhatsApp guidelines.

Key steps:

04.

Send initial messages

Begin sending messages to 1,000 unique customers in a rolling 24-hour period. This entry-level limit allows you to test customer engagement and refine your messaging approach. Focus on ensuring that messages are expected, timely, and relevant.

05.

Monitor message quality

Your partner will guide you on tracking notifications and quality signals. Maintaining a high-quality rating is essential for unlocking higher message limits.

06.

Adjust based on feedback

Use the insights from these early interactions to adjust your messaging strategy, focusing on improving and maintaining quality ratings.

Stage 3: Scale messaging

Once you've refined your approach and maintained high-quality interactions, you'll be ready to scale your messaging efforts. At this stage, you'll increase your message volume and expand your customer reach.



Key steps:

01.

Increase messaging limits

By demonstrating a record of sending high-quality messages to customers, you'll be able to send more messages—scaling from 1,000 to 10,000 to 100,000 per day and eventually unlimited.

02.

Consider Official Business Account (OBA) status

As your business messaging strategy grows, you may want to pursue OBA status for added trust and credibility. Your messaging partner can help you apply for this, giving your business a verified (blue checkmark) status on WhatsApp. This process requires evidence of significant presence in credible news articles.

03.

Maintain message quality as you scale

While scaling offers many opportunities, it also brings risks like eroded personalization, excessive messaging, or violating opt-in boundaries. To avoid these, continue sending messages that are expected, timely, and relevant. Low quality ratings can result in reduced message limits or account blocks if not addressed.

To deliver valuable experiences for people, messages should be **expected, timely and relevant**

Expected

Customers have already opted in to receive this information on WhatsApp.

Timely

Customers receive these messages at a logical time, like soon after engaging with a business, or at the requested frequency.

Relevant

The messages are personalized to the customer, contain valuable information, and present clear calls to action (CTAs).

As you embark on this exciting journey with the WhatsApp Business Platform, the onboarding process is your key to creating lasting, meaningful connections with your customers. Each step—from setting up your account to scaling your messaging—will prepare you to engage customers in a way that builds trust, delivers value, and fosters growth. By staying focused on quality, adhering to best practices, and working closely with your business messaging partner, you'll ensure that the onboarding process sets a strong foundation for success.

Thank you