



GoRightBiz

WHATSAPP · WEBSITES · AI

The WhatsApp Marketing Checklist

25 things to set up before and after your first WhatsApp campaign, in the order we set them up for our clients. Built for businesses across India on the official WhatsApp Business API.

How to use it: go through it with your team, tick what is done, and start with the first unticked box in each section.

1

Account & setup

Get the foundations right once, so nothing breaks later.

- ☐ **Use the official WhatsApp Business API**
Not the WhatsApp app or bulk-sender software. Bulk messages from normal numbers get banned.
- ☐ **Use a dedicated business number**
A number that is not registered on WhatsApp yet. Keep your personal number separate.
- ☐ **Keep the account in your own Meta Business portfolio**
Your company should own it, so you can change providers later without losing it.
- ☐ **Complete Meta business verification**
Keep your registration documents and a website matching your business name ready.
- ☐ **Fill in the business profile**
Logo, short description, address, website and working hours. Customers see this when they tap your name.

2

Opt-ins & your list

Message people who asked to hear from you. It protects your number and gets more replies.

- ☐ **Add a WhatsApp button to your website**
On every page, plus a click-to-chat link in your Instagram and Facebook bio.
- ☐ **Add a WhatsApp opt-in to your forms**
A clear checkbox such as "Send me updates on WhatsApp" on enquiry and checkout forms.
- ☐ **Put a QR code where customers already are**
At the billing counter, on invoices, packaging and visiting cards.
- ☐ **Tag every contact when they join**
Where they came from and what they are interested in. You will use these tags to segment.
- ☐ **Never upload a bought database**
Strangers block and report, and your quality rating drops for everyone on your list.

Want us to go through it with you?

Get a free growth audit: we review your WhatsApp setup, website and lead follow-up, and send you the three fixes worth doing first. Know someone who needs this checklist? Share gorightbiz.com/free-checklist

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3

Templates that get approved

Build a small library once so campaigns never wait for approval.

- ☐ **Pick the honest category**
Offers are marketing. Order, payment and appointment updates are utility. Wrong categories get rejected.
- ☐ **Write full sentences around variables**
Never start or end a template with {{1}}. Explain who is writing and why in the first line.
- ☐ **Add quick-reply buttons**
"Yes, send details", "Call me", "Not now". One tap gets far more replies than "contact us".
- ☐ **Prepare your core set**
Welcome, offer, order or appointment update, payment reminder and a "we miss you" message.
- ☐ **Proof-read before submitting**
Spelling mistakes, ALL CAPS and too many emojis are common reasons for rejection.

4

Replies & follow-up

Most lost sales on WhatsApp are slow replies, not bad campaigns.

- ☐ **Set an instant welcome reply**
Greet, offer three or four quick options, and say when a person will reply.
- ☐ **Use a shared team inbox**
Every chat assigned to one person, visible to the team. No enquiries stuck on one phone.
- ☐ **Agree a reply-time rule**
For example: every new chat answered by a person within one working hour.
- ☐ **Set follow-up reminders**
If a lead goes quiet, follow up after one day and again after three days, then close it.
- ☐ **Send every enquiry to your CRM**
So each lead has an owner, a status and a next step, not just a chat.

5

Campaigns & measurement

Send less, to the right people, and learn from every send.

- ☐ **Segment before you broadcast**
Start with three groups: recent customers, old customers, and enquiries who never bought.
- ☐ **One message, one offer, one next step**
Personalise with the name and something relevant to the person.
- ☐ **Send when someone can answer replies**
Evenings for most consumer businesses, weekday mornings for B2B.
- ☐ **Track four numbers every time**
Delivered, read, clicked and replied, plus the sales that came from it.
- ☐ **Retarget only the people who clicked**
A short, specific follow-up a day later often converts better than the first broadcast.