hey tomo

E-BOOK · 10 CHAPTERS

Choosing a Customer Engagement Platform: A Buyer's Guide for Indian Businesses



Introduction

A customer engagement platform is software that helps you stay in touch with your customers after the first sale: the right message, on the right channel, at the right time, to people who agreed to hear from you. There are many of them, and their websites all sound alike. This guide helps you cut through that and choose well.

It is written for Indian small and growing businesses: shops, clinics, salons, coaching centres, restaurants, D2C brands and service firms. It covers whether you need one at all, the must-haves, the questions to ask, the red flags, how to run a 30-day trial with a clear goal, a scoring checklist you can copy, and an honest look at the effort it takes to set one up. It does not name or compare any vendor.

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CHAPTER

01

Do you need one at all?



Not every business needs a platform today. Some need a good habit and a spreadsheet first. Be honest with yourself before you start comparing.

You probably do not need one yet if

- You have a small number of customers and you know most of them by name.
- You send a message to customers only a few times a year.
- You have not yet written down what you want customers to do more of: come back, rebook, reorder, refer a friend.
- Your customer details are scattered and you have not started collecting consent.

In that case, start with the basics: collect numbers and email addresses with clear permission, keep them in one place, and send a few useful messages by hand. You will learn what works.

You probably do if

- You have more customers than you can follow up with by hand, and some are slipping away unnoticed.
- You repeat the same messages every week: reminders, order updates, "we miss you", festive offers.
- Customers write to you at all hours and wait too long for simple answers.
- You use more than one channel (WhatsApp, SMS, email, an app) and nothing ties them together.
- You cannot tell which of your messages actually led to sales or bookings.
- You worry that you might be messaging people who did not agree, or at the wrong times.

Write down the problem first

Before you look at a single product, write one or two sentences about the problem you want to solve. For example: "Patients forget their follow-up appointments" or "Customers who order once rarely order again." Every later step in this guide comes back to that sentence. A platform that is brilliant at something you do not need is not a good choice for you.

CHAPTER

02

Must-have: the channels your customers use



A platform is only useful if it reaches customers where they already are. In India, that usually means several channels, each with its own rules.

WhatsApp

For many Indian customers, WhatsApp is the first place they look. The platform should use the official WhatsApp Business Platform, never an unofficial tool that automates a personal app. It should handle approved message templates, the customer service window, opt-in and opt-out, and replies coming back into a shared inbox.

SMS on DLT

Commercial SMS in India runs on DLT, the system set up under TRAI's rules. Each business registers itself as a Principal Entity, registers its sender headers and its message templates, and may send only those templates. A good platform:

- sends only your own registered templates, with your own entity, header and template IDs;
- lets you fill in the variables but not change the approved wording;
- never lets anyone, including any AI feature, write or rewrite the text of a DLT template;
- does not offer to let you send on someone else's registration.

Email

Email is good for receipts, longer updates and newsletters. Look for a working one-click unsubscribe, sender verification for your own domain, and bounce handling, so you do not keep sending to dead addresses.

Push and in-app messages

If you have a mobile app, push notifications and in-app messages reach customers inside it. Look for clear setup kits for Android and iOS, a way to ask permission at a sensible moment, and an in-app inbox if you need one.

Instagram and Facebook

If customers message you on Instagram or Facebook, the platform should bring those chats into the same inbox, through the official business APIs only.

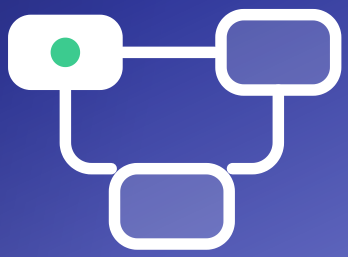
Ask

"Which channels do you support today, through which official routes, and which are still on your roadmap?" Buy for what works today, not for what is promised.

CHAPTER

03

Must-have: journeys and segments



Sending one message to everyone is a broadcast. Sending the right message to the right person when something happens is a journey. The second is where most of the value is.

A journey builder you can actually use

A journey is a set of steps that runs on its own: when a customer does something (or stops doing something), wait, check, send, and stop when they reach the goal. Look for:

- **A visual canvas** where you can see every step, rather than a long settings form.
- **Triggers** from real events: a first order, a booking, a missed appointment, a cart left behind, a customer going quiet.
- **Wait and check steps**, so the journey can wait a few days and then check whether the customer already acted.
- **Goals and exits**, so people leave the journey when they buy or book, instead of getting a reminder after the fact.
- **Ready-made journeys** for common needs, which you can edit, so you do not start from a blank screen.
- **A test mode** that sends nothing at all, so you can check a journey before it touches a real customer.

Segments

A segment is a group of customers who share something: "bought in the last 30 days", "booked twice but not this month", "lives in Pune", "opted in to WhatsApp offers". You should be able to build segments from profile details and from what customers did, and they should update on their own as customers change.

Two ways of working

Some teams like to build every step themselves. Others want the platform to suggest or draft journeys for them to review. A good platform supports both, and always lets a person review before anything goes live.

Try it

In a demo, ask the vendor to build a simple journey for your business in front of you: for example, a reminder before an appointment and a follow-up for no-shows. Watch how long it takes and how many screens it needs.

CHAPTER

04

Must-have: analytics with holdouts



Every platform shows numbers: sent, delivered, read, clicked. Those tell you whether messages arrived. They do not tell you whether messages worked.

What you really need to know

The question is: "Did this message cause customers to do something they would not have done anyway?" The honest way to answer it is a holdout group: a small random set of customers who would have got the message but did not. Compare the two groups, and the difference is the lift.

Look for

- **Holdouts built in,** for journeys and campaigns, chosen at random by the platform.
- **Goals you define,** such as an order, a booking or a visit within a number of days.
- **Funnels,** to see where customers drop off between steps.
- **Cohorts,** to see whether customers who joined in one month keep coming back.
- **Exports,** so your data is yours to download and analyse elsewhere.
- **Plain-language explanations,** so you do not need an analyst to read a report.

Be wary of

Reports that credit every sale to the last message the customer received. In a busy season, customers buy anyway. A platform that counts all of those sales as its own makes itself look good and tells you nothing useful.

CHAPTER

05

Must-have: compliance, data in India, and AI that knows your business



General information, not legal advice

This chapter describes what to look for at a general level. Laws, rules and platform policies change, and how they apply depends on your business. Check with your lawyer before you rely on it.

Consent and compliance built in

Consent should not be a setting you have to remember. It should be checked automatically. Look for a platform that:

- records consent by purpose and channel, with when and how it was given;
- checks consent before every message and again at the moment of sending, so a stop request that arrives in between is honoured;
- handles stop requests in any language, including common Hinglish ones like "band karo" and "mat bhejo";
- keeps quiet hours for marketing and reminders, and lets only service messages go out at any hour;
- never sends marketing to under-18s, and can send needed reminders to a parent or guardian instead;
- keeps a suppression list that imports cannot override;
- lets you answer customer requests to see, correct or delete their data.

India's Digital Personal Data Protection Act, 2023 sets out duties for businesses that handle personal data, and you stay responsible for your customers' data even when a provider processes it for you. Ask how the platform helps you meet those duties.

Where your data is stored

Ask where customer data is stored and processed, and where backups are kept. Many Indian businesses prefer data stored in India. Ask too who at the vendor can access it, how keys and passwords for your channels are stored (they should be encrypted and never shown back to anyone), and what happens to your data if you leave.

AI that answers from your knowledge

Many platforms now offer AI. The useful kind answers customers from your own business knowledge (your hours, services, policies and FAQs), says when it does not know, and hands over to a person in a shared inbox with the full chat history. Ask:

- Where does it get its answers? Can you see and edit that knowledge?
- What happens when it does not know? Does it guess or hand over?
- Can you set things it must never answer or promise?
- Will it ever write or change regulated text, such as DLT SMS templates? (The answer should be no.)
- Can you read every conversation it has had?

The AI Employee Handbook goes deeper on what good looks like.

CHAPTER

06

Questions to ask every vendor



Ask every vendor the same questions, in writing if you can, so you can compare their answers fairly. Here is a list to start from.

Fit

- Who are your customers? Do you work with businesses like mine, of my size and industry?
- What would you set up first for a business like mine, and why?
- Can I see the product working on realistic data, not just slides?

Channels and compliance

- Which channels work today, and through which official routes?
- How do you handle DLT for SMS? Do I use my own registration and templates?
- How is consent recorded and checked? What happens if a customer says stop mid-journey?
- How do you handle quiet hours and under-18 customers?

Data and security

- Where is my data stored and processed? Where are backups?
- How are my channel keys stored? Can anyone at your company see them?
- Can I export all my data at any time, in a usable format?
- What happens to my data if I stop using you?
- How will you tell me about a security incident?

Setup and support

- What do I need to do to get started, and how long does it usually take?
- Who helps me set up? Is support by chat, email or phone, and in which hours?
- Is there a test mode that sends nothing?

Commercial terms

- How does pricing scale as my customer list and message volume grow?
- Are channel costs (such as WhatsApp conversation charges) included or separate?
- What is the notice period to leave? Are there setup or exit fees?

Good vendors answer these clearly. If an answer is vague, ask again. If it is still vague, write that down as an answer.

CHAPTER

07 Red flags



Some warning signs are worth walking away over. Others are worth a second, sharper question.

Walk away

- **Unofficial WhatsApp sending.** Any tool that automates a normal WhatsApp app or WhatsApp Web to send in bulk breaks the platform's terms and puts your number at risk of a ban.
- **Borrowed DLT approvals.** An offer to send SMS on someone else's registration or templates, so you can skip registering your own.
- **AI that rewrites regulated text.** A feature that "improves" your DLT SMS wording before sending.
- **Bought or rented lists.** Any suggestion that you can "add contacts" you did not collect yourself.
- **No way to stop.** Opt-outs that do not work on every channel, or that need the customer to do more than reply.
- **No data export.** If you cannot take your customer data with you, you do not really own it.

Ask harder questions

- **Big promises with no method.** Claims of huge sales increases with no explanation of how they were measured. Ask whether a holdout was used.
- **Every feature "coming soon".** Ask for a date, and buy for what exists today.
- **Night sending by default.** Marketing that is allowed to go out at any hour unless you remember to stop it.
- **Keys shown back to you.** If the platform can display your channel passwords or API keys after you save them, so can anyone who gets into your account.
- **Pressure to sign today.** A good platform will still be good next week.

- **No test mode.** You should be able to build and check without risking a real send.

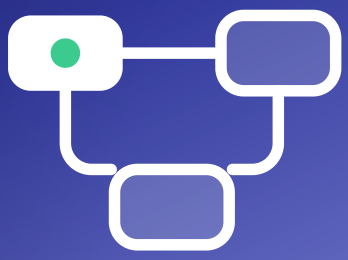
A simple rule

If a shortcut would get you more messages out faster by skipping consent, registration or the official route, it is not a feature. It is a risk to your business.

CHAPTER

08

Run a 30-day trial with a clear goal



A demo shows you what a product can do. A trial shows you what it does for your business. Run one before you commit, and run it properly.

Before day one

1. **Pick one goal**
   Go back to the problem sentence from chapter 1 and turn it into a measurable goal: "More patients come back for their follow-up" or "More first-time buyers order a second time within 45 days."
2. **Pick one or two journeys**
   The ones that serve that goal. Do not try to set up everything.
3. **Gather what you need**
   Your customer list with consent, your WhatsApp Business account, any registered DLT templates, and your top customer questions if you are testing an AI helper.
4. **Agree who does what**
   One person on your side owns the trial. Know who to call at the vendor.

The four weeks

Week	What to do
Week 1	Connect your channels, import your customers with their consent, set quiet hours and opt-out words. Build your journeys in test mode.
Week 2	Go live with a holdout group. Check the first real sends by hand. Read replies every day.
Week 3	Let it run. Fix anything that confused customers. Note every time you needed help and how quickly it came.
Week 4	Compare the message group with the holdout. Count opt-outs and complaints. Score the platform with the checklist in the next chapter.

What to judge at the end

- Did the goal move, compared with the holdout? Remember that a month is short and small numbers can mislead.
- How much of your time did it take each week?
- Did anything go wrong with consent, timing or wording? How quickly was it caught?
- Would your team keep using it without you pushing them?

CHAPTER

09

A scoring checklist



Score each platform you trial from 0 to 3 on each line: 0 means missing, 1 means weak, 2 means good enough, 3 means strong. Weight the lines that matter most for your problem. Copy the table into a spreadsheet and fill it in for each vendor.

Area	What good looks like	Score (0 to 3)
WhatsApp	Official platform, templates, opt-in and opt-out, shared inbox	
SMS on DLT	Your own entity, header and templates; wording never altered	
Email	Own domain, one-click unsubscribe, bounce handling	
Push and in-app	Clear Android and iOS kits, sensible permission prompts	
Instagram and Facebook	Official APIs, chats in the same inbox	
Journey builder	Visual canvas, triggers, waits, checks, goals and exits	
Ready-made journeys	Useful starting points for your industry, easy to edit	
Segments	Built from profile and behaviour, update on their own	
Test mode	Sends nothing at all while you build	
Analytics	Goals, funnels, cohorts, exports, plain language	
Holdouts and lift	Random holdouts built in, lift shown clearly	
Consent	By purpose and channel, checked before and at send	
Opt-outs	Work in any language, on every channel, immediately	
Quiet hours and frequency caps	On by default for marketing and reminders	
Under-18s	No marketing; reminders to a parent or guardian	
Data location and security	Stored in India, keys encrypted and never shown back	
Data export and exit	Full export at any time, clear exit terms	
AI answers	From your knowledge, hands over when unsure, fully reviewable	
Ease of use	Your team can run it without the vendor	

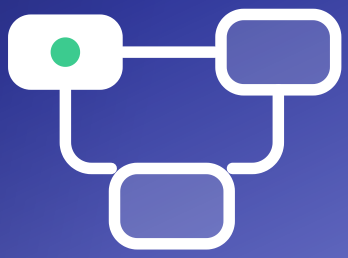
Area	What good looks like	Score (0 to 3)
Support	Reachable in your hours, helpful in the trial	
Commercial clarity	Clear answers on how pricing scales and what is extra	

Do not just add up the totals. A platform that scores 3 everywhere except consent, or that fails a walk-away red flag, is not the right choice, whatever its total.

CHAPTER

10

The real effort to set up



Vendors often say "set up in minutes". Some parts are quick. Others take time that has nothing to do with the software. Plan for both.

Quick

- Creating your account and inviting your team.
- Turning on a ready-made journey and editing its wording.
- Setting quiet hours, opt-out words and frequency caps.
- Adding a chat widget to your website.

Takes longer, whatever platform you choose

- **WhatsApp Business setup.** Verifying your business and getting your message templates approved by WhatsApp can take some days.
- **DLT registration.** Registering your entity, sender header and templates for SMS is your own process with the DLT system, and it takes time. Start early.

- **Your customer data.** Gathering it from billing systems, booking apps and spreadsheets, removing duplicates, and making sure you have consent for what you plan to send.
- **App integration.** If you have a mobile app, your developer needs to add the kit and send the events your journeys need.
- **Your knowledge.** Writing down hours, policies and FAQs for an AI helper, and reviewing its chats in the first weeks.
- **Your team's habits.** Someone needs to own it, read the replies, and look at the results every week.

Ongoing

Budget a little time every week: reading replies and handovers, checking results against holdouts, keeping knowledge and templates current, and adding one new journey when the last one is working. A platform that is set up and then ignored slowly drifts out of date.

Where Hey Tomo fits

We built Hey Tomo for Indian small businesses with this checklist in mind: journeys on a canvas, the main channels through official routes, SMS only on your own DLT templates, consent checked before every message and at send, holdouts in Analyze, and AI employees that answer from your knowledge and hand over to your team. You can let Tomo set things up for you, or build it yourself. Score it the same way you score everyone else.



Put it to work

Score Hey Tomo with the checklist above, the same way you score any other platform. Run your 30-day trial with one clear goal and a holdout. Start free. Related guides: Register SMS templates on DLT, Consent, opt-outs and quiet hours and the glossary.

Hey Tomo helps Indian small businesses bring customers back on WhatsApp, SMS, email, push and in-app, with AI employees that answer from your own knowledge. Let Tomo do it for you, or build it yourself.

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