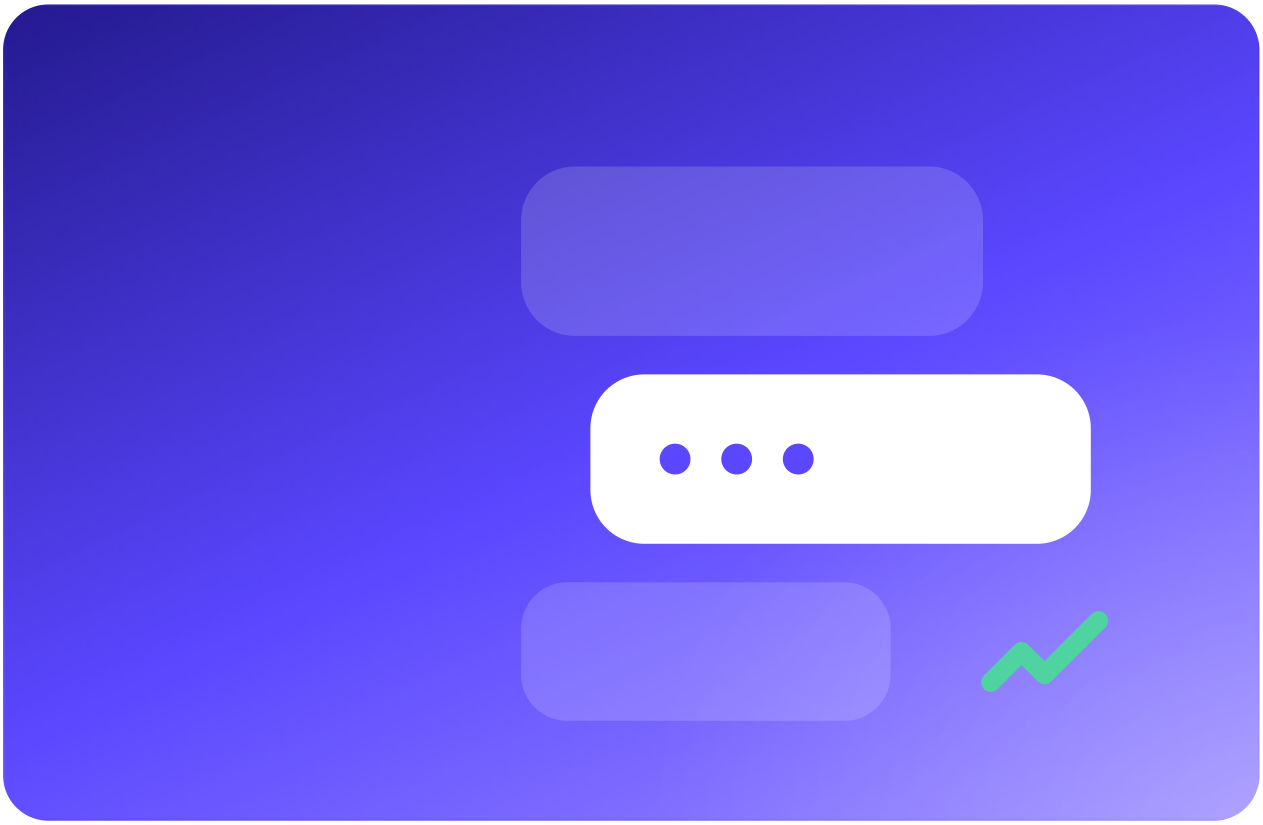
hey tomo

E-BOOK · 9 CHAPTERS

The WhatsApp Playbook for Indian Small Businesses



Introduction

Most Indian small businesses already live on WhatsApp. Orders come in there, bookings get confirmed there, and the owner's phone buzzes with it from morning to midnight. This playbook is about doing it on purpose: getting permission, sending the messages customers are glad to get, answering when you are asleep, and knowing which messages actually brought people back.

It is written for owners and the people who run marketing for them: a kirana store, a salon, a clinic, a coaching centre, a restaurant, a D2C brand. You do not need to be technical. Each chapter ends with something you can do this week.

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CHAPTER

01 Why WhatsApp



Your customers open WhatsApp many times a day. They chat with family there, they get their school updates there, and more and more they talk to the shops and services they use there too. A message from you lands in the same place as a message from their sister. That is a huge privilege, and it is also why it is easy to get wrong.

Compare it with the other ways you can reach a customer:

- **SMS** is reliable and reaches every phone, but it is one way. In India it also has strict rules: every promotional or service SMS must use a template the business has registered on DLT. It is great for an OTP or a short booking alert, less great for a conversation.
- **Email** is good for receipts, long updates and anything people want to keep. Many small-business customers in India check it rarely.
- **App push and in-app messages** are excellent if you have an app and people keep it installed. Many small businesses do not have one yet.
- **Phone calls** are personal but expensive in time, and people often do not pick up unknown numbers.

WhatsApp sits in the middle. It is personal like a call, it is written like an SMS, and the customer can reply in one tap. They can send you a photo of the product they want, a voice note asking for directions, or a thumbs-up to confirm a booking.

What WhatsApp is good at

- Confirming things: orders, bookings, payments received, deliveries.
- Reminding people of something they already want: an appointment tomorrow, a refill due, a class at five.
- Answering questions quickly, with a real conversation.

- Bringing back a regular who has gone quiet, in a friendly voice.

What it is bad at

- Cold outreach to people who never asked to hear from you. It is against WhatsApp's rules, it gets your number reported and blocked, and it hurts your name.
- Long newsletters. Nobody reads ten paragraphs on a phone.
- Blasting the same offer to everyone, every week.

What it looks like done well

Picture a neighbourhood salon that runs WhatsApp on purpose. A new client books on Monday and gets one welcome message with the address and a map pin. On Friday evening she gets a reminder for her Saturday slot and taps "Confirm". After the visit she gets a short thank-you with a button asking how it went; she taps "Loved it" and leaves a review. Six weeks later, when her usual gap has passed, she gets a note from her stylist offering her usual time. At no point did she get a message she did not expect, at an hour she would not want, or one she could not stop.

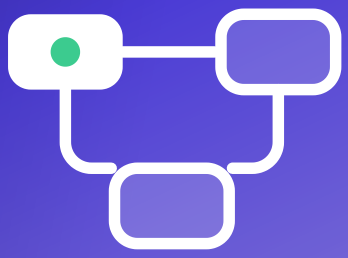
Nothing in that week is clever. Each message is useful, expected and easy to answer. That is the whole playbook in one paragraph; the rest of this book is how to do it reliably for every customer.

This week

Write down the three messages your customers ask you for most often. Those are almost always your first journeys.

CHAPTER

02 Getting set up



There are two ways to run WhatsApp for a business, and they suit different stages.

The WhatsApp Business app is the free app on one phone. It gives you a business profile, quick replies, labels and a small catalogue. It is perfect when the owner answers everything personally. It does not let you automate journeys across hundreds of customers, connect a team inbox, or measure what worked.

The WhatsApp Business Platform is the official route for software like Hey Tomo. Messages go out from your business number through an approved connection, many team members can share one inbox, and you can send approved templates to customers who opted in. This is what you need for journeys, reminders and an AI employee.

Before you connect

1. **Pick the number carefully**
   Use a number your customers will recognise, ideally the one already on your shop board or Google listing. A number connected to the platform usually cannot be used in the normal WhatsApp app at the same time, so check before you move your main number.

2. **Get your business details ready**
   Your registered business name, a display name customers will see, your category, address, working hours, website and a clear logo from your own files.

3. **Choose a display name that matches your brand**
   WhatsApp reviews display names. Use the name on your signboard or invoices, not a slogan.

4 **Fill in the profile fully**
A short description, your hours and your address make a new customer far more comfortable replying.

Set up the basics your customers will see

- **A greeting.** A short first reply for people who message you for the first time, saying who they are talking to and when a person is available.
- **An away message.** For when the shop is closed. If you have an AI employee answering, say so honestly.
- **Quick replies for the common questions.** Timings, location, how to order, how to book.
- **Your catalogue or service list.** Even a short one saves a lot of back and forth.

Connecting it to Hey Tomo

In the Hey Tomo dashboard you connect WhatsApp from **Channels**. The connection runs through the official WhatsApp platform, never through unofficial tools or browser tricks. Once connected, your number appears in the inbox, and journeys can use it as a channel. Our step-by-step guide, Set up WhatsApp Business the right way, walks through each screen.

Avoid shortcuts

Tools that "automate WhatsApp Web" or send from a normal app by scripting it break WhatsApp's terms. Numbers that use them get banned, often with no way back. Stick to the official platform.

CHAPTER

03 Getting opt-in



Opt-in means the customer has clearly said yes to hearing from you on WhatsApp. It is the foundation of everything else in this book. WhatsApp requires it, India's data protection law expects consent to be clear and specific, and, most of all, customers who said yes actually read what you send.

Where to ask

- **At the counter.** "Would you like your bill and offers on WhatsApp?" Tick it in your billing screen only if they say yes.
- **A QR code on the table or the till.** Scanning opens a chat with your business with a ready message such as "Hi, please send me updates". The customer sends it themselves.
- **Your website or booking form.** A checkbox that is *not* ticked by default, with a plain sentence beside it.
- **When they message you first.** Answer their question, then ask if they would like reminders or offers on this chat.
- **Your Instagram or Facebook bio.** A click-to-chat link, so people who already follow you can start a chat.

What to say

Be specific about what they are signing up for. Compare:

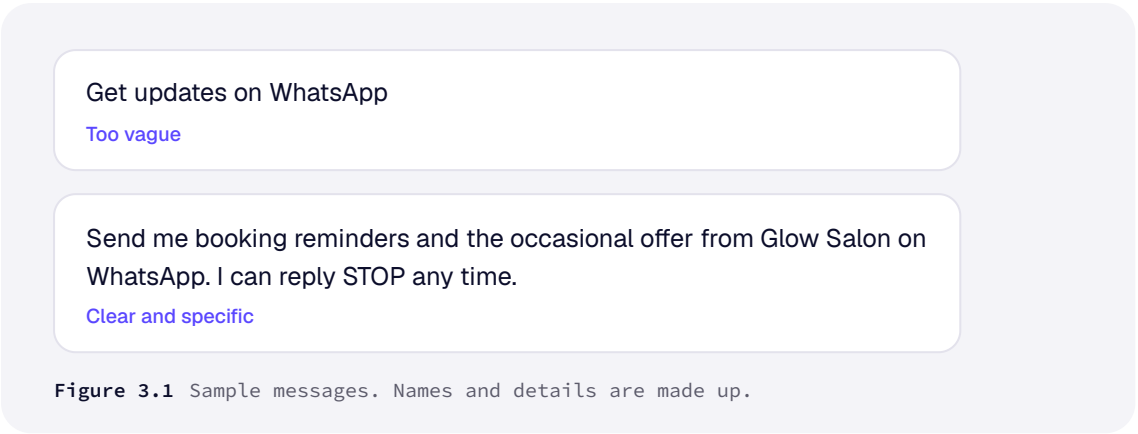


Figure 3.1 Sample messages. Names and details are made up.

If you plan to send both service messages (booking reminders, order updates) and marketing (offers, new arrivals), say so, or better, ask for each separately. Many people happily take reminders but not offers. Respecting that split keeps them on your list.

Scripts that work at the counter

Staff often feel awkward asking. Give them one line to say, matched to your business:

- **Kirana:** "Shall I send your bill on WhatsApp? We also share fresh stock once a week, only if you want it."
- **Salon:** "Would you like a reminder on WhatsApp before your next appointment?"
- **Clinic:** "We can send your appointment reminders and reports on WhatsApp. Is this number okay for that?"
- **Restaurant:** "Want to hear about our new dishes on WhatsApp? Maybe twice a month, no more."
- **Coaching centre:** "We send class updates to parents on WhatsApp. Which number should we use?"

Notice that each one names what the customer will get and, where it matters, how often. People say yes more easily when they know what they are saying yes to.

Record it

For each customer, keep a note of when they agreed, where (counter, QR, website), and what they agreed to. Hey Tomo keeps consent on each customer's profile, so every journey can check it before it sends. If a customer ever asks "why did you message me?", you can show them.

What not to do

- Do not upload your whole phone contact list and start messaging.
- Do not buy or borrow lists.

- Do not treat "they bought from us once" as permission for marketing.
- Do not pre-tick the box.

This week

Print one QR code for your counter with a single clear line of text. Put the same link in your Instagram bio.

CHAPTER

04

Templates, conversations and the 24-hour window



WhatsApp has one rule that shapes how every business message works. Learn it once and the rest makes sense.

The 24-hour window

When a customer sends you a message, a customer service window opens for 24 hours. Inside that window you can reply freely, in your own words, with text, photos, documents or voice notes. Each new message from the customer starts the window again.

Outside the window, you cannot just type a message and send it. You must use a **message template**: wording you have submitted in advance and WhatsApp has approved.

Templates

A template is a message with fixed wording and a few blanks, called variables, that you fill in for each customer. For example:

Hi {{1}}, your appointment at Smile Dental is tomorrow at {{2}}. Reply 1 to confirm or 2 to reschedule.

Template with two variables

Figure 4.1 Sample messages. Names and details are made up.

Templates sit in categories. **Utility** templates are about something the customer already did or asked for: an order update, a booking confirmation, a payment receipt. **Marketing** templates are offers, new products, invitations and win-back messages. **Authentication** templates carry one-time codes. Choose honestly. A discount dressed up as an "order update" is likely to be rejected or re-labelled, and it erodes trust.

Three examples, one per category

Hi {{1}}, your order {{2}} from Fresh Basket has been delivered. Reply here if anything is missing or damaged.

Utility

Hi {{1}}, the monsoon menu is here at Café Monsoon: hot soups, fresh pakoras and masala chai all day. Want us to keep a table for you this weekend?

Marketing

{{1}} is your verification code. Do not share it with anyone.

Authentication

Figure 4.2 Sample messages. Names and details are made up.

Getting templates approved

- Write the way you speak to customers. Plain, polite and specific.
- Keep variables for the parts that change: a name, a date, an order number. Do not make the whole message one big variable.
- Do not start or end a template with a variable.
- Add quick-reply buttons for the obvious answers ("Confirm", "Reschedule", "Stop offers").
- Avoid shouting: no ALL CAPS, no rows of exclamation marks.

Conversations

Once a customer replies, you are back inside the window and can talk naturally. That is where WhatsApp shines. A good template is often just the opener; the conversation that follows is where the booking or the sale happens.

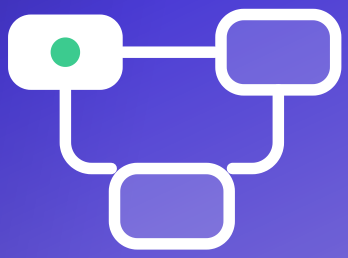
A note on SMS

SMS has a different and stricter system: DLT templates registered by your own business. Hey Tomo never writes or rewrites SMS wording for you. Read Register SMS templates on DLT before you use SMS in a journey.

CHAPTER

05

The first five journeys



A journey is a set of messages that runs on its own when something happens: a customer signs up, places an order, books a slot, or goes quiet. In Hey Tomo you build them on a canvas, or ask the AI to draft one for you and then review it. Start with these five. Between them, they cover most of what a small business needs.

1. Welcome

Trigger: a customer opts in for the first time. **Goal:** say hello, set expectations, make the next step easy.

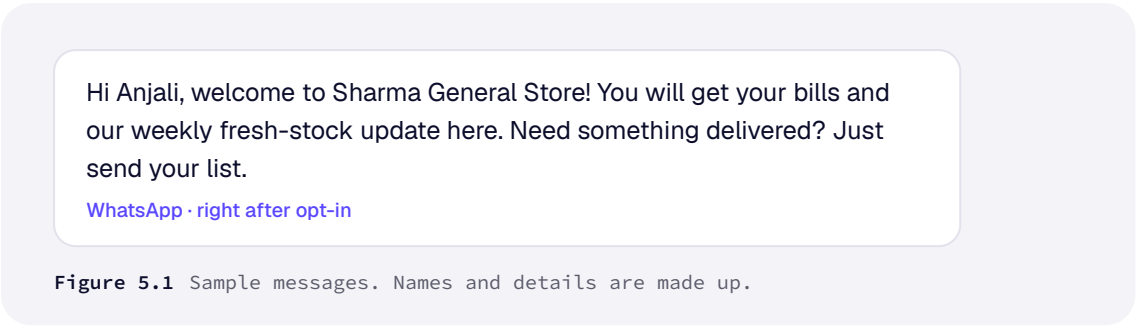


Figure 5.1 Sample messages. Names and details are made up.

Keep it to one message. Do not lead with a discount. Tell them what they will get and how often.

2. Order or booking updates

Trigger: an order is placed, packed, sent or delivered; a booking is made or changed. **Goal:** fewer "where is my order?" calls.

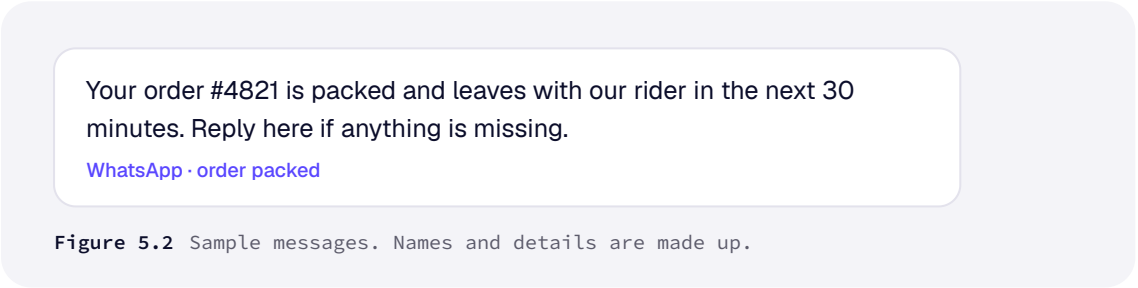


Figure 5.2 Sample messages. Names and details are made up.

These are service messages, the most welcome kind. Keep offers out of them.

3. Reminders

Trigger: an appointment, class, renewal or refill coming up. **Goal:** fewer no-shows and late renewals.

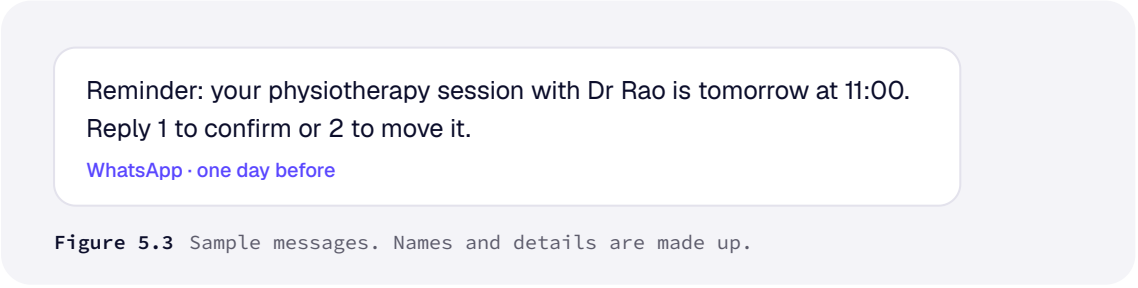


Figure 5.3 Sample messages. Names and details are made up.

A reminder the day before, and a short nudge two hours before, works for most appointment businesses. Reminders keep quiet hours. For a student or patient under 18, the reminder goes to their parent or guardian. Our guide Cut no-shows with reminders goes deeper.

4. Review ask

Trigger: a visit or delivery is complete. **Wait:** a few hours, or the next day for a delivery. **Goal:** more honest reviews, and an early warning when something went wrong.

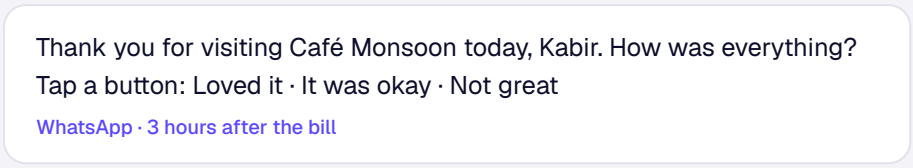


Figure 5.4 Sample messages. Names and details are made up.

If they tap "Loved it", send your review link. If they tap "Not great", route the chat to a person straight away. You learn about the problem before it becomes a one-star review.

5. Win-back

Trigger: a regular has not come back for longer than usual. **Goal:** bring them back before they forget you.

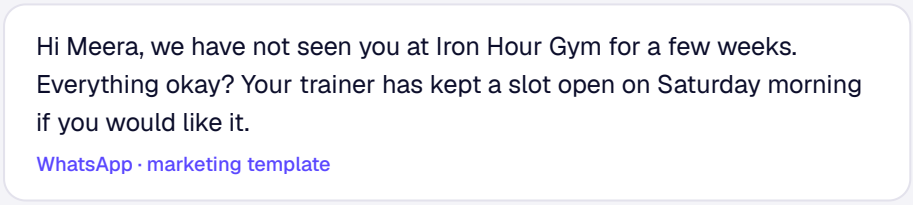


Figure 5.5 Sample messages. Names and details are made up.

Win-back is marketing, so it needs marketing consent and respects quiet hours. It is also where most of the value hides. Our e-book Win-Back: 12 Journeys That Bring Customers Home has a full journey for each kind of business.

This week

Switch on the order or booking update first. It earns trust, cuts calls, and needs no clever writing.

CHAPTER

06 Writing messages people thank you for



The best business messages read like they came from someone who knows the customer. Here are the habits that get you there.

Seven rules

1. **Use their name, and yours**
   "Hi Priya, it's Sunita from Glow Salon" beats "Dear Customer".
2. **Say why you are writing now**
   A reason makes a message feel useful, not random: "your last cut was six weeks ago", "the mangoes you asked about are in".
3. **One message, one ask**
   Confirm, book, reply, visit. Not all four.
4. **Keep it short**
   If it does not fit on a phone screen without scrolling, cut it.
5. **Make the reply easy**
   Buttons or a single number to reply with.
6. **Sound like you**
   If your shop is warm and chatty, your messages can be too. If you run a clinic, calm and clear is better.
7. **Always leave a way out**
   A "Stop offers" button, or a line saying they can reply STOP.

Before and after

DEAR CUSTOMER!!! MEGA SALE ON NOW. VISIT OUR STORE TODAY. LIMITED PERIOD ONLY!!!

Before

Hi Rohit, the new school shoe stock is in at Footsteps, Jayanagar, including size 4 that you asked about last month. Want us to keep a pair aside?

After

Figure 6.1 Sample messages. Names and details are made up.

The second message is not cleverer. It is more specific. It knows something about Rohit, and it asks a question he can answer in one word.

Emojis, language and length

- One emoji can add warmth. Five makes it look like spam.
- Write in the language your customer uses with you. Many customers reply in Hinglish; matching their tone in a conversation is fine.
- Avoid jargon: "your slot is confirmed" beats "your booking has been successfully processed".

Five mistakes to avoid

- **Sending the same offer to everyone.** A new customer and a ten-year regular need different messages.
- **Hiding the point.** If the message is about a booking, say "booking" in the first line.
- **Fake urgency.** "Last chance!" every week trains people to ignore you.
- **Links with no context.** A bare link from a business looks like a scam. Say what it opens.
- **Not reading the replies.** Every message invites a reply. Make sure someone, or your AI employee, is there to answer.

Let the AI help, carefully

Hey Tomo can suggest WhatsApp wording and variations to test. Read every draft before it goes out, and make sure it sounds like your business. SMS is different: AI never writes or rewrites SMS text, because the text sent must match your registered DLT template exactly.

CHAPTER

07 Answering at night with an AI employee



Customers message when it suits them, not when your shop is open. A question at 11 at night that waits until noon the next day often turns into a sale for someone else. Our blog post Never keep a customer waiting tells this story in more detail.

What an AI employee does

An AI employee in Hey Tomo answers customers from your business's own knowledge: your services, menu, timings, policies, delivery areas, and the questions you get every day. It does not make things up from the internet. If the answer is not in your knowledge, it should say so and hand over.

Teach it well

- Add the questions customers really ask, in their words. "Do you deliver to Whitefield?" "Is Sunday open?" "Can I bring my dog?"
- Add the answers you would give, with any conditions.
- Add what it must never do: promise a refund, give a medical opinion, agree a discount, or share another customer's details.

Here is what a short exchange looks like when the knowledge is good:

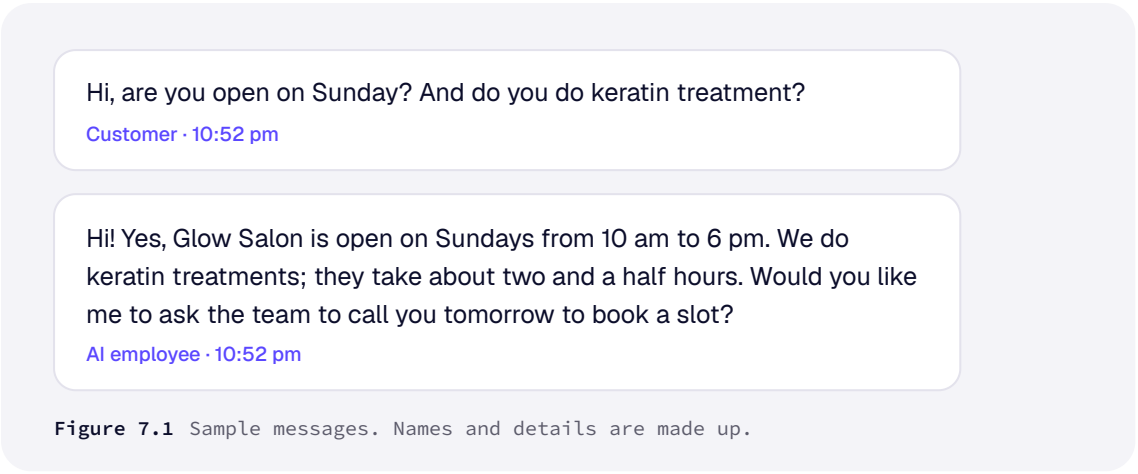


Figure 7.1 Sample messages. Names and details are made up.

It answers both questions from the salon's own knowledge, then offers a next step instead of guessing at things it does not know, such as which stylist is free.

Our guide Train your AI employee shows how to build that knowledge step by step.

The handover

The most important part of an AI employee is knowing when to stop. Set it to hand the chat to a person when:

- the customer asks for a person;
- it is not confident of the answer;
- the customer is upset or making a complaint;
- money is involved: refunds, failed payments, disputes;
- it is a health, legal or safety question.

At night, the handover should be honest:

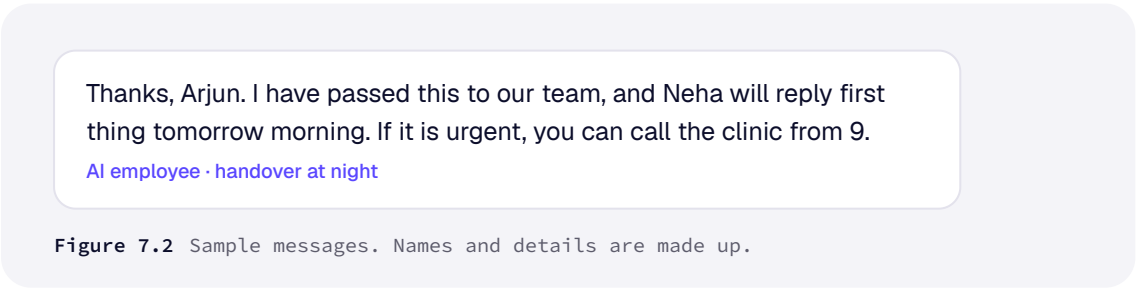


Figure 7.2 Sample messages. Names and details are made up.

Replying to a customer who wrote to you is a service message, so it can go out at any hour. Starting a new marketing conversation at night is not.

This week

Write down the ten questions you answered most last month. That list is your AI employee's first lesson.

CHAPTER

08

Consent, opt-outs and quiet hours



Customers trust businesses that respect their time and their choices. These rules protect your number, your name, and your customers.

Check consent every time

Consent is not a one-time box. Hey Tomo checks a customer's consent for the channel and purpose before each message is queued, and checks again at the moment it is sent. If they opted out in between, the message does not go.

Stop means stop, in any language

Customers do not always type "STOP". They write "stop sending", "unsubscribe", "no more", "band karo", "mat bhejo", or just "please don't message me". All of these should work. Hey Tomo treats a clear stop request in any language as an opt-out. A short confirmation lets the customer know it worked:

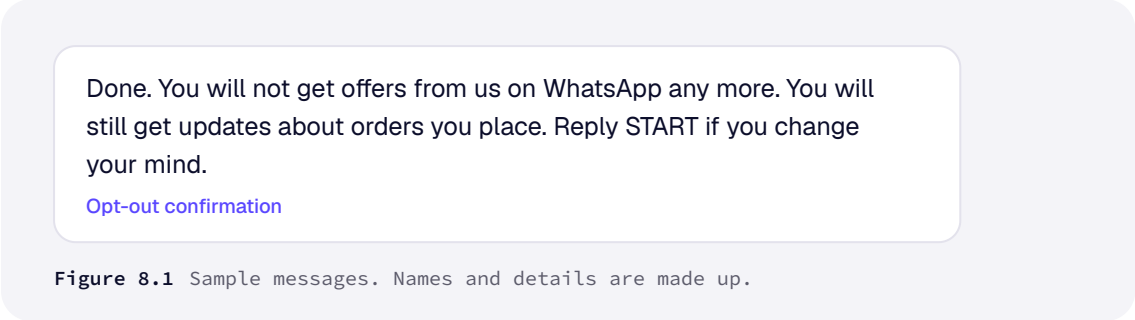


Figure 8.1 Sample messages. Names and details are made up.

Quiet hours

Nobody wants an offer at 10:45 at night. India's telecom rules restrict promotional calls and SMS to daytime hours, and the same courtesy is right for WhatsApp. In Hey Tomo, quiet hours apply to marketing and to reminders. Only service messages, such as replying to a customer or sending an order update they are waiting for, may use the owner's 24/7 option.

Service or marketing?

The line matters, because the rules differ. When you are not sure, ask: did the customer do or ask for something that this message is about? If yes, it is probably service. If it is trying to sell, it is marketing.

Message	Type	Quiet hours?
Reply to a customer's question	Service	Can go any time
Order packed, out for delivery	Service	Can go any time with the 24/7 option
Appointment tomorrow at 11	Reminder	Keeps quiet hours
Refill or renewal due	Reminder	Keeps quiet hours
New menu, festive offer, we miss you	Marketing	Keeps quiet hours, needs marketing consent

Under-18s

Customers under 18 never get marketing. For a coaching centre or a paediatric clinic, reminders about classes or appointments go to the parent or guardian instead.

Test before you go live

Use test mode when you are building a journey. In test mode nothing is sent at all, so you can check the steps without surprising anyone.

For the full picture, read our guide Consent, opt-outs and quiet hours and the e-book Consent-First Marketing in India.

CHAPTER

09 Measuring what worked



Sending messages is easy. Knowing which ones made a difference is the hard part, and it is what separates a business that grows from one that just sends more.

Start with the simple numbers

- **Replies.** How many people answered? On WhatsApp, a reply is a strong sign the message was welcome.
- **Opt-outs.** If a message makes more people stop than usual, the wording, timing or audience is wrong.
- **Repeat visits or orders.** Did the customers who got the win-back message come back?
- **No-shows.** For appointment businesses, did reminders cut them?

Read rates are worth watching, but treat them with care. Many customers turn read receipts off.

The question that matters: did it work?

Here is the trap. You send a win-back message to 1,000 quiet customers and 200 come back. Success? Maybe. Some of those 200 would have come back anyway.

The fair way to know is a **holdout group**. Before the journey starts, a small random slice of the eligible customers is set aside and gets nothing. Then you compare:

	Got the message	Holdout (no message)
Customers	900	100
Came back within 30 days	180	12
Rate	20%	12%

In this made-up example, the message lifted the return rate by eight points. That difference, not the 180, is what the journey earned. Hey Tomo's Analyze section calls this the "did it work" lift and shows it for journeys that run with a holdout.

What to measure for each journey

Journey	The number that tells you it worked
Welcome	Share of new opt-ins who order or visit again within a month
Order or booking updates	Fewer "where is my order?" chats and calls
Reminders	Fewer no-shows and late cancellations
Review ask	New reviews, and unhappy customers caught early
Win-back	Lift in return rate compared with the holdout

Rules of thumb

- Keep the holdout random. Do not hand-pick who gets left out.
- Give it time. A week is rarely enough for a business people visit monthly.
- Small groups give noisy answers. Treat a lift from a few dozen customers as a hint, not proof.
- Change one thing at a time: the wording, or the timing, or the audience.

A weekly fifteen minutes

1. **Look at opt-outs first**
   Anything unusual? Pause it and read the message again.
2. **Look at replies**
   Read a handful of real conversations. You will learn more than from any chart.

3 **Look at lift**

For journeys with a holdout, is the lift holding up?

4 **Change one thing**

Then check again next week.



Put it to work

Sign up, connect WhatsApp from Channels, and switch on your first order or booking update. Build it yourself on the canvas, or let Tomo draft it for you to review. Start free. Related guides: Set up WhatsApp Business the right way, Build your first journey and Train your AI employee.

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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