Good practices for handling WhatsApp conversations

Your missions are developing and you are now going to handle (or have already started handling) conversations from WhatsApp in your iAdvize conversation panel. If you are used to managing chat conversations, **you will find all your usual tools** to answer visitors efficiently.

Nonetheless, even if there is no change to your tools, you need to follow **a few good practices specific to this communication channel**.

#1 Your status button

As with chat, you have a status button for **managing your availability on social and third-party channels such as WhatsApp**. It is important to manage your availability properly, because a conversation in your conversation panel cannot be handled by anyone else but you!

As soon as you are ready, set your status to **available** (green) and the conversations will start arriving in your conversation panel.

So you can work in peace, your status will appear as **busy** (orange) when you have reached your maximum amount of conversations as defined by your manager.

Remember to set your status back to **unavailable** (red) at the end of your day before logging off. This will prevent you from receiving conversations you would not have time to handle.

#2 Conversations handled like other conversations

- The WhatsApp symbol in the state box and conversation window shows you where the conversation comes from.

- Take the time to read the visitor's message carefully and **bring up the conversation thread to acquaint yourself with the conversation history**: your interlocutor might have already shared useful information with one of your coworkers!

Nicolas Ernest
Hi John, I am looking for a new
01m 30s   08m 45s
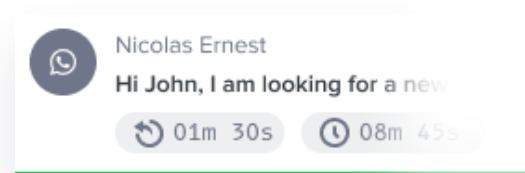
#3 A 24-hour period in which to answer

A specific feature of WhatsApp conversations is that **you have a 24-hour period in which to answer your visitor**. After that, Facebook (which owns WhatsApp) requires you to prompt your visitors with a pre-written message to check if they are still interested.

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- if the visitor wrote to you less than 24 hours ago, you can answer right away. In this case, **write a complete answer** then send your message.

- If the visitor wrote to you more than 24 hours ago (for example at the weekend), **your text field is blocked and you have to send a pre-written message**.

  The visitor then has to tell you whether they wish to continue the conversation or not.
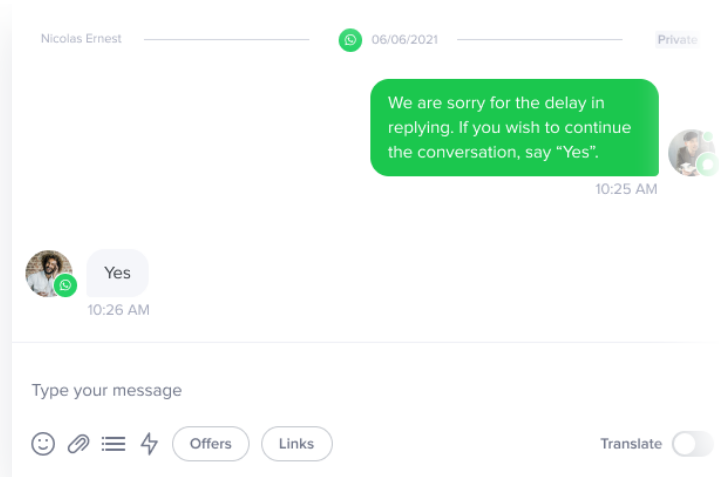
#4 Your two options for ending the conversation

In all cases, when answering a conversation, **you can keep it open for a few minutes** (2-3 minutes maximum). This allows for a quick resolution if your visitor replies instantly.

You then have two options: snooze or close the conversation.

Snooze — Choose to **snooze it if you are waiting for an answer** from your visitor. We recommend the default 3-hours snooze option.

End — Choose to **close it if the conversation does not need to be continued**. Don't worry, your visitor will still be able to contact you again if need be and, unlike chat, they will not be invited to complete a satisfaction survey.

Important: if you receive a conversation that was snoozed after sending a pre-defined message, **there is no need to prompt the visitor a second time**. You can close the conversation.

#5 The option to transfer to a coworker or team

Even if your visitors are not necessarily expecting an answer in a few seconds, responsiveness is still key on WhatsApp. That's why **we recommend using transfers sparingly** and only when your department is really unable to handle the query.

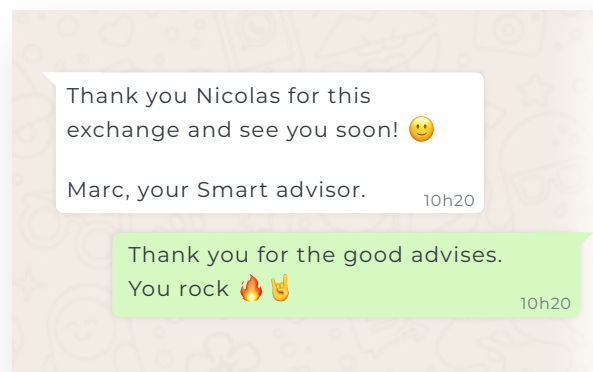If you choose to transfer a conversation, you can select a particular coworker or a group of coworkers.
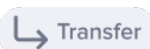
Transfer — If **the visitor wrote to you less than 24 hours ago, tell them you have received their query** and are forwarding it to the appropriate department. Then make the transfer.

If **the visitor wrote to you more than 24 hours ago**, your text field is blocked: no need to send the pre-written message. Make the transfer and **your coworker will take care of sending this message, which is necessary in order to continue the conversation**.

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#6 Ambassador for your brand

In WhatsApp, you are more of a brand ambassador than ever. **Your brand's logo and name** are displayed in WhatsApp (whereas in the chat your visitor see your personal avatar and nickname).

- According to your manager's instructions, **you can sign your messages with your first name** (e.g. *[First name], your [Brand] agent*), which will make the conversation friendlier.

- **You can also use your interlocutor's name** if they signed their message or told you their identity via an order number for example.

> Thank you Nicolas for this exchange and see you soon! 🙂
>
> Marc, your Smart advisor.　　10h20
>
> Thank you for the good advises. You rock 🔥🤘　10h20

Of course, you need to follow **the writing rules**, in particular **spelling and the stages of the conversation**: it's up to you to lead the conversation, from greetings to saying goodbye, even if your visitor is not as polite or even stops answering.

Finally, you will see your visitors are quite inclined to use **emojis** in this communication channel. You can do the same: people always like to see a 🙂!

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