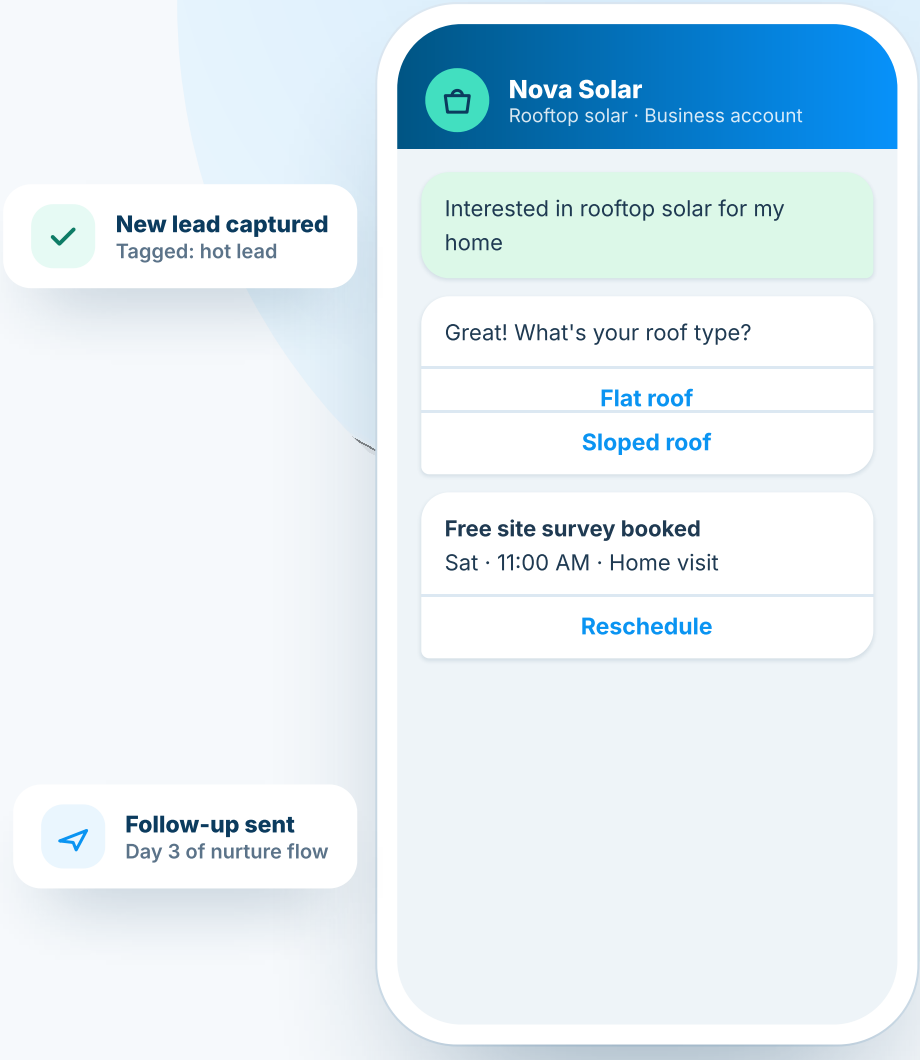
QuickMessage
Boost Your Marketing



A PRACTICAL GUIDE FOR SALES & MARKETING TEAMS

WhatsApp for Lead Nurturing

How the WhatsApp Business API and QuickMessage help you capture, qualify, follow up and convert leads with chatbots, flows, templates, team inbox and CRM, explained step by step.

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Official WhatsApp Business API

01–02
App vs API · How QuickMessage works

03–05
WhatsApp rules · Lead journeys · Templates

06–08
Inbox & CRM · Best practices · FAQs & setup

SECTION 01

WhatsApp Business App vs Business API

Most businesses get leads from ads, websites and calls, and many of them go cold simply because nobody followed up in time. Doing follow-ups by hand from personal numbers does not scale. The **WhatsApp Business API** is the official version built for automation, a whole sales team and CRM integration. QuickMessage gives you the API through a simple dashboard, with no coding.

	WhatsApp Business App	WhatsApp Business API + QuickMessage
Follow-ups	Typed manually, often forgotten	✓ Timed nurture messages sent automatically
Who replies	One phone, a few linked devices	✓ Whole sales team from one company number
Bulk messages	Broadcast lists with limits	✓ Nurture campaigns to opted-in leads by interest and stage
Automation	Basic greeting & away messages	✓ Chatbots, auto-replies and no-code flows
Message templates	Not available	✓ Approved templates for follow-ups, reminders, quotes, offers
Buttons in messages	Limited	✓ Book a call, View quote, Talk to expert buttons
Lead data	Stays on agents' phones	✓ Contacts with tags, custom attributes and lists
Integrations	None	✓ Your CRM, website forms or ad lead forms

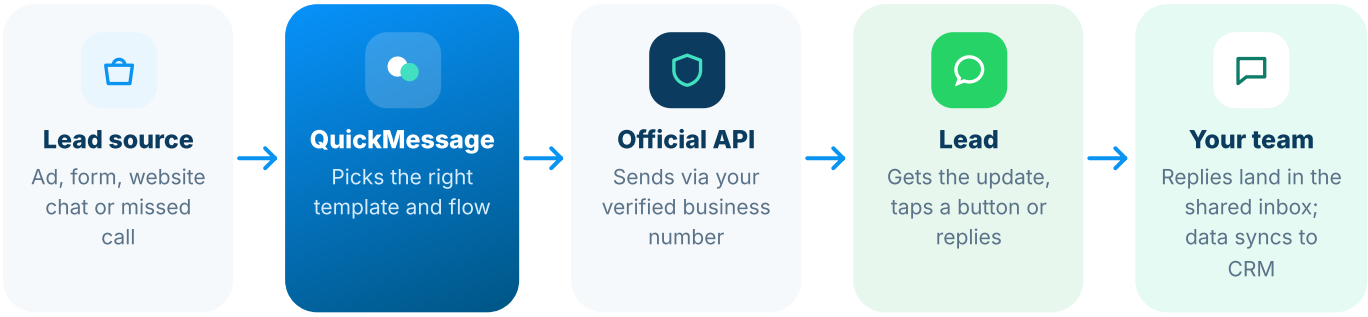
In short

A personal number works for a handful of leads. Once you run ads, get daily enquiries or have a sales team, the API with QuickMessage makes sure every lead gets a fast reply and a planned follow-up.

SECTION 02

How QuickMessage works

QuickMessage connects your lead sources, your CRM and your leads on WhatsApp. Events such as a new form fill, a booked call or a lead going quiet trigger WhatsApp messages, and every reply lands in one dashboard for your sales team.



The five building blocks

Shared Team Inbox
All lead chats in one place. Assign hot leads to the right salesperson instantly.

Campaigns & Templates
Approved messages for welcome replies, call reminders, quotes, check-ins and offers.

No-Code Flow Builder
Build nurture journeys like welcome → qualify → guide → call → quote → follow-up, without code.

Chatbot & Bot Replies
Qualify leads 24×7 with questions and buttons; hand over to sales when a lead is ready.

CRM Integrations & Analytics
Keep lead stage, source and tags in one place, connect your CRM, and see which sources and flows bring sales.

Where WhatsApp fits in the lead journey

CAPTURE
Ad, form or website button starts a chat.

QUALIFY
Chatbot asks need, budget and timeline.

NURTURE
Guides, answers and timely check-ins.

CONVERT
Call or visit booked, quote shared.

RE-ENGAGE
Cold leads get a polite check-in.

One number, one dashboard
Leads hear from you quickly on the app they check most, and no lead is forgotten. Behind the scenes, marketing and sales work together from a single QuickMessage dashboard.

SECTION 03

Key WhatsApp rules to know

The WhatsApp Business API has a few rules that protect people from spam. QuickMessage is built around them, but it helps to understand how they work.

1 · Leads must opt in

Only message people who have agreed to hear from you on WhatsApp. Common ways to collect opt-in from leads:

- **Consent tick-box on lead forms**
- **Lead messages you first**
- **Click-to-WhatsApp ads**
- **QR at events & stores**

2 · The 24-hour customer service window



Open window
Reply freely: answers, brochures, videos, quotes, links.

Window closed
Start a conversation only with an approved template.

3 · Message templates and their categories

Templates are reusable messages WhatsApp reviews before use. They can include variables such as the lead's name or product of interest, shown as `{{1}}` `{{2}}`, plus buttons.

UTILITY

Updates about something the lead asked for.

Enquiry received, call or visit confirmations and reminders, requested quotes

MARKETING

Promotions and offers.

Most nurture messages: guides, check-ins, customer stories, offers, re-engagement

AUTHENTICATION

One-time passwords.

OTP to verify a lead form or log in

4 · Charges

WhatsApp (Meta) charges for certain business-initiated messages; the rate depends on the template category and country. The QuickMessage team will share current rates and plans during your demo.

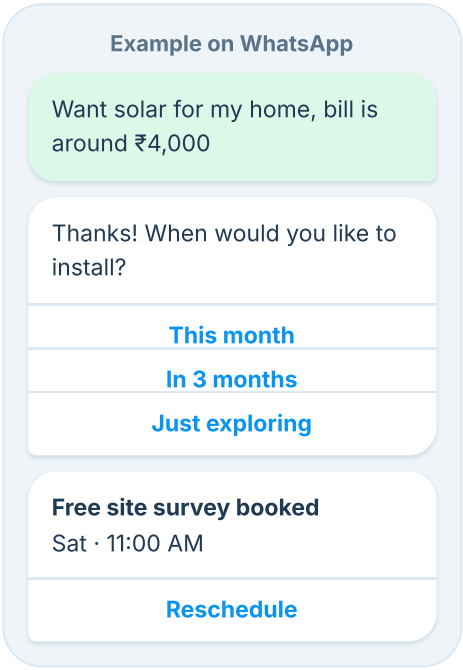
SECTION 04

Lead journeys, step by step

How capturing, nurturing and re-engaging leads runs on WhatsApp with QuickMessage. Each journey is built in the no-code flow builder.

A · Capture & qualify

1. Lead clicks your WhatsApp ad, fills a form or taps a website button.
2. Chatbot asks what they need, budget, location and timeline.
3. Lead is saved, tagged (hot, warm, cold) and assigned to sales.
4. Hot leads get a **call or visit booking** option right in the chat.
5. **Confirmation and reminder** templates reduce no-shows.
6. Warm and cold leads move into a nurture flow (journey B).



B · Nurture sequence



An example schedule you set in the flow builder. If the lead replies or books a call at any point, the flow stops and the chat goes to sales. Choose timings that suit your sales cycle.

C · Re-engage cold leads

Tag
Leads tagged by source, interest and stage

→

Segment
e.g. leads with no reply in 30 days

→

Check in
Polite message with a Stop updates option

→

Convert
Interested replies go back to sales

SECTION 05

Sample message templates

Use these as starting points. Replace {{1}}, {{2}} with your own fields in QuickMessage, keep the tone warm and helpful, and submit them for approval. Always give an easy way to opt out.

enquiry_received — UTILITY

Right after a lead form is submitted

Hi {{1}}, thanks for your enquiry about {{2}}. Our expert {{3}} will get in touch with you shortly.

- Talk now
- Call me later

consultation_confirmation — UTILITY

When a lead books a call or visit

Hi {{1}}, your {{2}} is confirmed for {{3}} at {{4}}. Our team looks forward to speaking with you.

- Add to calendar
- Reschedule

consultation_reminder — UTILITY

A few hours before the call or visit

Hi {{1}}, a reminder that your {{2}} is today at {{3}}. Please confirm you are available.

- Confirm
- Reschedule

quote_shared — UTILITY

When a quote the lead asked for is ready

Hi {{1}}, the quote you requested for {{2}} is ready. Tap below to view it, or reply with any questions.

- View quote
- Talk to expert

guide_follow_up — MARKETING

Day 1 of the nurture flow

Hi {{1}}, here is our short guide to {{2}} to help you compare your options.

- View guide
- Stop updates

callback_scheduled — UTILITY

When a lead asks for a call back

Hi {{1}}, as requested, {{2}} will call you on {{3}} at {{4}}.

- Change time

Check-ins, stories & re-engagement

lead_check_in

MARKETING

Day 7, if the lead has not replied

Hi {{1}}, still thinking about {{2}}? We're happy to answer any questions.

- Yes, talk to me
- Not now
- Stop updates

customer_story

MARKETING

To build trust while a lead decides

Hi {{1}}, see how a customer in {{2}} chose their {{3}}. Watch the short story below.

- Watch story
- Talk to expert

limited_offer

MARKETING

Sent to opted-in leads during a real offer period

Hi {{1}}, our {{2}} offer on {{3}} is valid till {{4}}. Book a free consultation to know more.

- Book a call
- Stop updates

re_engagement

MARKETING

For leads with no reply in 30+ days

Hi {{1}}, it's been a while! Are you still interested in {{2}}?

- Yes, interested
- Stop updates

Tips for faster template approval

- Be specific: say exactly what the message is about (enquiry, call, quote, offer).
- Use variables only for details that change, like name, product, date and salesperson.
- Choose the right category: confirmations of something the lead asked for are **Utility**; nurture messages and offers are usually **Marketing**.
- Keep buttons short and clear, such as Book a call, View quote, Stop updates.

How a template is used

1 · Draft — Write the template with variables and buttons in QuickMessage

→

2 · Submit — Send it for WhatsApp review from the dashboard

→

3 · Approved — Template becomes available to use

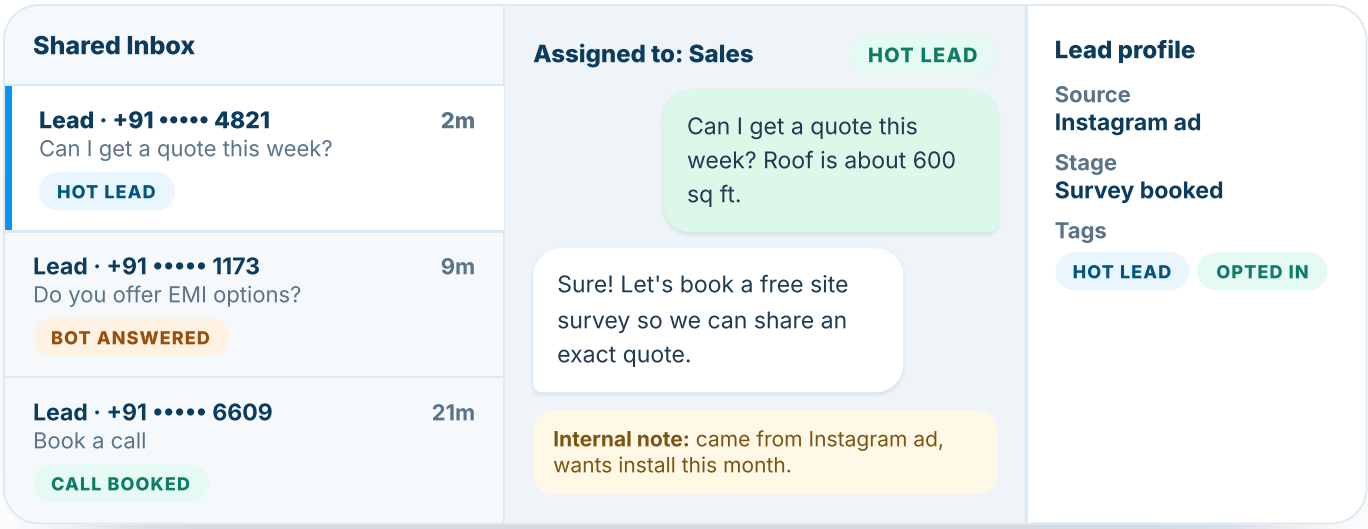
→

4 · Automate — Trigger it from your system or send as a campaign

SECTION 06

Sales inbox, leads & CRM

Every lead becomes a contact in QuickMessage with its source, stage and tags. Your sales team sees every conversation in one place, so no follow-up is missed.



Shared Team Inbox

- One company WhatsApp number for every salesperson.
- Assign chats, add internal notes and see conversation history.
- Quick replies for pricing questions, brochures and FAQs.
- Chatbot handles routine questions and hands over to staff.

CRM integrations & analytics

- Connect your CRM, website forms and ad lead forms.
- See which sources, flows and templates bring sales.
- Track conversations handled by each staff member.

Contacts, tags & custom attributes

Type	Lead examples
Tags	New lead, Hot, Warm, Cold, Call booked, Won, Lost
Custom attributes	Lead source, Product interest, Budget, City, Timeline, Owner
Lists / segments	New this week, No reply 7 days, Hot leads, Cold 30+ days

SECTION 07

Best practices for lead nurturing

Good nurturing feels helpful, not pushy. These habits keep leads engaged and your number in good standing.

Do

- Take clear WhatsApp consent on every lead form.
- Reply to new leads within minutes with a chatbot.
- Send useful content: guides, FAQs, real customer stories.
- Stop the flow as soon as a lead replies or books.
- Add a Stop updates button to nurture messages.
- Hand hot leads to a salesperson quickly.

Don't

- Send messages every day to the same lead.
- Use fake urgency or offers that do not exist.
- Send the same message to every lead, whatever their stage.
- Message leads who haven't opted in.
- Keep messaging leads who asked to stop.
- Ask for sensitive details like card numbers in chat.

Respect the lead's choice
High block or report rates can lower your number's quality rating and limit your sending. Keep messages relevant and spaced out, honour opt-out requests immediately, and follow applicable data-protection laws.

Ways to bring leads onto WhatsApp

QR codes at events, stores and on brochures.

Chat button and WhatsApp consent on website forms.

Click-to-WhatsApp ads on Instagram and Facebook.

Missed calls and sales calls: invite leads to continue on WhatsApp.

SECTION 08

FAQs

Can it connect with our CRM or ad lead forms?
QuickMessage supports CRM integrations. Share the systems you use during the demo and the team will advise on connecting them.

When does a nurture flow stop?
You decide. Usually when the lead replies, books a call, is marked won or lost, or taps Stop updates.

Can several salespeople share one number?
Yes. Leads are assigned to salespeople from one Shared Team Inbox.

Do we need to know coding?
No. Templates, chatbots and flows are set up from the QuickMessage dashboard with a no-code builder.

Can we send brochures and videos?
Yes. Within the 24-hour window you can share files freely; templates can carry an image, video or document header.

How much does it cost?
Pricing depends on your plan and WhatsApp's message charges. Book a demo for current pricing.

Getting started in six steps

01
Book a demo
Tell us about your products, lead sources and sales process.

02
Connect your number
Set up your API account and business profile with our team.

03
Connect your systems
Link your CRM and lead forms and import opted-in leads.

04
Create templates
Draft welcome, reminder, check-in and offer templates.

05
Build your flows
Set up qualifying bot and nurture flows.

06
Go live
Add QR codes and chat buttons, then start nurturing leads.

Ready to turn more leads into customers?

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BOOK A DEMO →