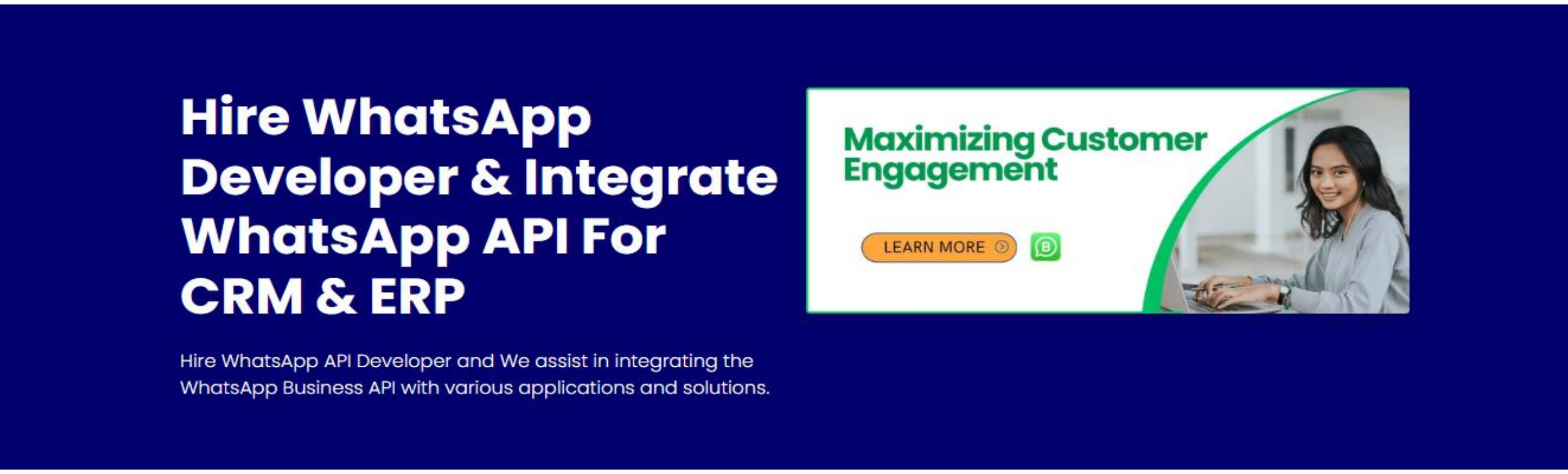
42 Important WhatsApp Templates for CRM Communication



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1. Lead Generation & Follow-Up

Template Name: New_Lead_Confirmation

Purpose: Confirm lead submission and provide a follow-up.

Hello [Customer Name],

Thank you for your interest in [Product/Service]. We have received your inquiry. A representative will contact you soon. Meanwhile, you can reply with:

1️⃣*More Information* - To receive more details about our services.

2️⃣*Schedule a Call* - To book a meeting with our representative.

3️⃣*Stop* - To unsubscribe from further messages.

Regards,

[Company Name]

2. Order Confirmation

Template Name: Order_Confirmation

Purpose: Confirm order details and provide updates.

Hi [Customer Name],

Your order #[Order Number] has been confirmed. Here are the details:

- **Product:** [Product Name]

- **Quantity:** [Quantity]

- **Total:** [Total Amount]

- **Estimated Delivery:** [Delivery Date]

You can reply with:

1️⃣*Order Status* - To get the current status of your order.

2️⃣*Cancel Order* - To cancel your order.

3️⃣*Support* - To contact our support team.

Thank you for shopping with us!

3. Support Ticket Creation

Template Name: Support_Ticket

Purpose: Create a new support ticket in CRM.

Hello [Customer Name],

We have received your support request. Your ticket number is #[Ticket Number]. Our team will get back to you within [Response Time].

You can reply with:

1️⃣*Status* - To check the status of your ticket.

2️⃣*Cancel* - To cancel this ticket.

3️⃣*Update* - To add more information to your request.

Regards,

[Support Team]

4. Appointment Scheduling

Template Name: Appointment_Confirmation

Purpose: Confirm scheduled appointments and send reminders.

Hi [Customer Name],

Your appointment with [Advisor/Agent Name] has been confirmed for [Date and Time].

Please reply with:

1️⃣*Reschedule* - To reschedule your appointment.

2️⃣*Cancel* - To cancel your appointment.

3️⃣*Confirm* - To confirm the appointment.

Looking forward to meeting you!

Regards,

[Company Name]

5. Feedback Request

Template Name: Feedback_Request

Purpose: Collect customer feedback after a service or product delivery.

Hi [Customer Name],

We hope you had a great experience with [Product/Service]. We would love to hear your feedback.

Please reply with a number between 1 and 5 to rate your experience (1 being the lowest and 5 the highest).

Thank you for your valuable input!

Best Regards,

[Company Name]

6. Custom Notification & Alerts

Template Name: Custom_Notification

Purpose: Send custom notifications or alerts.

Hi [Customer Name],

We have an important update for you regarding [Subject].

Please reply with:

1️⃣*Details* - To get more information.

2️⃣*Ignore* - To ignore this message.

Thank you,

[Company Name]

7. Payment Reminder

Template Name: Payment_Reminder

Purpose: Remind customers about upcoming payments.

Hello [Customer Name],

This is a reminder that your payment of [Amount] for [Product/Service] is due on [Due Date].

Please reply with:

1️⃣*Pay Now* - To pay your bill.

2️⃣*Schedule* - To schedule a payment.

3️⃣*Support* - To contact support.

Thank you,

[Company Name]

8. Lead Qualification

Template Name: Lead_Qualification

Purpose: Qualify a lead by gathering more details.

Hi [Customer Name],

Thank you for your interest in [Product/Service]. We would like to know more about your requirements to serve you better.

Please reply with:

1️⃣ *Budget* - Your estimated budget.

2️⃣ *Timeline* - Your expected timeline for the project.

3️⃣ *Decision Maker* - If you are the decision-maker or if someone else is.

This will help us assist you more efficiently.

Best Regards,

[Sales Team]

9. Contact Information Update

Template Name: Contact_Update

Purpose: Request updated contact information from the customer.

Hi [Customer Name],

We are updating our records to serve you better. Could you please confirm or update your contact details?

Current Info:

- **Phone:** [Phone Number]

- **Email:** [Email Address]

- **Address:** [Mailing Address]

Please reply with any updates or type *Correct* if the information is accurate.

Thank you!
[Customer Support Team]

10. Sales Opportunity Follow-Up

Template Name: Opportunity_Follow_Up

Purpose: Follow up on an ongoing sales opportunity.

Hello [Customer Name],

I hope you're doing well. I wanted to follow up on our discussion about [Product/Service].

Please let us know if you have any questions or if you'd like to schedule a demo.

You can reply with:

1️⃣*Questions* - To ask any questions.

2️⃣*Demo* - To schedule a product demo.

3️⃣*Proposal* - To request a detailed proposal.

Looking forward to your response.

Best Regards,
[Sales Representative]

11. Task Assignment Notification

Template Name: Task_Assignment

Purpose: Notify employees about new tasks assigned through the CRM.

Hi [Employee Name],

A new task has been assigned to you in the CRM.

- **Task Name:** [Task Name]

- **Due Date:** [Due Date]

- **Description:** [Task Description]

Please log in to the CRM to review the task details and update the status as you progress.

Best Regards,

[Your Company]

12. Meeting Reminder & Confirmation

Template Name: Meeting_Reminder

Purpose: Remind customers or team members about scheduled meetings.

Hello [Name],

This is a reminder for your meeting scheduled with [Employee Name] on [Date and Time].

Please confirm your availability by replying with:

1️⃣*Confirm* - If you will attend.

2️⃣*Reschedule* - To reschedule the meeting.

3️⃣*Cancel* - To cancel the meeting.

Thank you,

[Company Name]

13. Pipeline Stage Update Notification

Template Name: Pipeline_Stage_Update

Purpose: Notify sales representatives of changes in a deal's pipeline stage.

Hi [Sales Rep Name],

The deal with [Customer Name] has moved to the [New Stage] stage in the sales pipeline.

- **Deal Value:** [Deal Value]

- **Expected Close Date:** [Close Date]

Please review the details in the CRM and take necessary actions to close the deal successfully.

Best Regards,

[Sales Manager]

14. Customer Information Request

Template Name: Customer_Info_Request

Purpose: Collect specific customer information for CRM updates.

Hi [Customer Name],

To personalize your experience, we would like to update your profile in our system.

Could you please provide the following information:

- **Preferred Contact Time:**

- **Preferred Mode of Communication (Phone/Email/WhatsApp):**

- **Interests or Preferences:**

Reply with your details at your convenience.

Thank you!

[Customer Support Team]

15. CRM Data Verification

Template Name: CRM_Data_Verification

Purpose: Verify the accuracy of CRM data.

Hi [Customer Name],

We are conducting a data verification exercise to ensure our records are accurate.

Could you please verify if the following details are correct?

- **Company Name:** [Company Name]

- **Position:** [Position]

- **Industry:** [Industry]

Reply with *Yes* if correct or provide the updated information if needed.

Thank you for your cooperation!

Thank you!

[Customer Support Team]

16. Deal Closure Notification

Template Name: Deal_Closure

Purpose: Notify relevant stakeholders about the closure of a deal.

Hi Team,

Great news! The deal with [Customer Name] has been successfully closed at [Deal Value].

- **Closed By:** [Sales Rep Name]

- **Deal Type:** [Product/Service]

- **Next Steps:** [Next Actions]

Let’s celebrate this success and move forward with the next steps as planned.

Best,

[Sales Manager]

17. Automated Customer Re-Engagement

Template Name: Customer_Reengagement

Purpose: Re-engage customers who have been inactive.

Hi [Customer Name],

We noticed you haven’t interacted with us in a while. We’d love to hear from you!

Reply with:

1️⃣*New Offers* - To receive our latest offers.

2️⃣*Schedule Call* - To schedule a call with our team.

3️⃣*Feedback* - To share your thoughts with us.

We value your relationship with us and hope to serve you again soon.

Best Regards,

[Company Name]

18. Customer On boarding

Template Name: Customer_Onboarding

Purpose: Welcome new customers and guide them through the onboarding process.

Hi [Customer Name],

Welcome to [Company Name]! We are excited to have you on board.

To get started, please follow these steps:

1️⃣*Account Setup* - Set up your account.

2️⃣*Product Training* - Access our training resources.

3️⃣*Support* - Contact our support team for any help.

Let us know if you have any questions. We are here to help!

Best Regards,

[Customer Success Team]

19. Customer Profile Completion

Template Name: Profile_Completion_Request

Purpose: Request additional details to complete a customer’s profile in CRM.

Hi [Customer Name],

We’d like to complete your profile to provide you with a personalized experience.

Could you please share:

- **Company Size:**

- **Key Business Challenges:**

- **Preferred Contact Time:**

This information will help us serve you better.

Thank you!

[Customer Support Team]

20. Deal Renewal Reminder

Template Name: Deal_Renewal_Reminder

Purpose: Remind customers about upcoming deal renewals.

Hi [Customer Name],

This is a reminder that your subscription/service for [Product/Service] will expire on [Expiry Date].

Please reply with:

1⃣ *Renew* - To renew your service.

2⃣ *Discuss Options* - To discuss new options or upgrades.

3⃣ *Support* - To speak with our support team.

Thank you for choosing us!

Best Regards,

[Customer Success Team]

21. CRM Data Cleanup Request

Template Name: CRM_Data_Cleanup

Purpose: Request internal team members to review and update CRM records.

Hi [Employee Name],

We are conducting a CRM data cleanup. Please review and update the following records assigned to you:

- **Lead:** [Lead Name]

- **Opportunity Stage:** [Stage]

- **Next Follow-Up:** [Date]

Make sure all fields are updated and accurate.

Thank you for your attention to this matter!

Regards,

[CRM Admin Team]

22. Activity Follow-Up Reminder

Template Name: Activity_Follow_Up_Reminder

Purpose: Remind sales reps or account managers to follow up on scheduled activities.

Hi [Sales Rep Name],

This is a reminder to follow up on the following activities:

- **Lead Name:** [Lead Name]

- **Activity Type:** [Call/Meeting/Email]

- **Due Date:** [Date]

Please log your follow-up actions in the CRM.

Best Regards,

[Sales Manager]

23. Cross-Sell/Upsell Notification

Template Name: Cross_Sell_Opportunity

Purpose: Notify sales reps about potential cross-sell or upsell opportunities based on CRM data.

Hi [Sales Rep Name],

Based on recent interactions, there is a cross-sell opportunity with [Customer Name].

- **Current Product:** [Current Product]

- **Suggested Product:** [Suggested Product]

- **Rationale:** [Reason for Recommendation]

Please reach out to the customer and update the CRM with your notes.

Best Regards,

[Sales Manager]

24. Event Invitation & RSVP

Template Name: Event_Invitation

Purpose: Invite customers to events or webinars and collect RSVPs.

Hi [Customer Name],

You are invited to our upcoming event, *[Event Name]* on [Date & Time].

Please reply with:

1️⃣*RSVP* - To confirm your attendance.

2️⃣*More Info* - To get more information about the event.

3️⃣ *Unsubscribe* - To opt-out of event notifications.

We look forward to seeing you!

Best Regards,

[Event Team]

25. Milestone Celebration Message

Template Name: Milestone_Celebration

Purpose: Celebrate customer milestones like anniversaries or high-value deals.

Hi [Customer Name],

Congratulations on reaching your [Milestone/Anniversary] with [Company Name]! 🎉

We truly value our partnership and look forward to many more successful years together.

Please let us know if there’s anything we can do to support your growth.

Cheers!

[Account Manager]

26. Inactive Lead Reactivation

Template Name: Inactive_Lead_Reactivation

Purpose: Re-engage leads that have gone cold in the CRM.

Hi [Lead Name],

We haven’t heard from you in a while, and we’d love to reconnect.

Please reply with:

1️⃣*Schedule a Call* - To discuss your needs.

2️⃣*Send Info* - To receive information about our latest offerings.

3️⃣*Not Interested* - To let us know if you’re no longer interested.

We look forward to hearing from you!

Best Regards,

[Sales Team]

27. Customer Success Check-In

Template Name: Customer_Success_CheckIn

Purpose: Regularly check in with customers to gauge satisfaction and offer support.

Hi [Customer Name],

Just checking in to see how everything is going with [Product/Service].

Please let us know if there’s anything we can assist you with. Your feedback is important to us!

You can reply with:

1️⃣*Great* - If everything is going well.

2️⃣*Needs Improvement* - If you have any concerns or suggestions.

3️⃣*Support* - To get in touch with our support team.

Looking forward to your response!

Best Regards,

[Customer Success Manager]

28. Nurture Campaign Check-In

Template Name: Nurture_Campaign_CheckIn

Purpose: Reach out as part of a nurture campaign to provide valuable content and maintain engagement.

Hi [Customer Name],

We hope you're finding our resources helpful. Here's our latest article: [Link].

Would you like more content on:

1️⃣*[Topic 1]*

2️⃣*[Topic 2]*

3️⃣*[Topic 3]*

Please reply with the number of your choice. We look forward to providing more valuable insights!

Best Regards,

[Marketing Team]

29. Contract Expiry Alert

Template Name: Contract_Expiry_Alert

Purpose: Notify customers or internal teams about upcoming contract expirations.

Hi [Customer Name],

Your contract for [Product/Service] is set to expire on [Expiry Date].

Please reply with:

1️⃣*Renew* - To renew your contract.

2️⃣*Discuss Options* - To explore other plans or services.

3️⃣*Support* - To get in touch with our team for assistance.

We look forward to continuing our partnership.

Best Regards,

[Account Management Team]

30. Data Improvement Request

Template Name: Data_Enrichment_Request

Purpose: Request additional data from customers to enrich CRM records.

Hi [Customer Name],

To serve you better, we would like to complete your profile in our system.

Could you please provide the following details:

- **Company Website:**

- **Annual Revenue:**

- **Number of Employees:**

- **Primary Business Goals:**

This will help us tailor our services to your needs.

Thank you for your cooperation!

Best Regards,

[Customer Success Team]

31. Internal CRM Task Completion Reminder

Template Name: Internal_Task_Completion

Purpose: Remind internal teams to complete pending tasks within CRM.

Hi [Employee Name],

This is a reminder to complete the following CRM tasks assigned to you:

- **Task:** [Task Description]
- **Due Date:** [Due Date]

Please update the task status in the CRM once completed.

Thank you for your attention!

Best Regards,

[CRM Admin]

32. Lead Reassignment Notification

Template Name: Lead_Reassignment

Purpose: Notify sales reps or managers about lead reassignment in the CRM.

Hi [Sales Rep Name],

The lead [Lead Name] has been reassigned to you.

- **Lead Source:** [Source]
- **Current Stage:** [Stage]
- **Next Action:** [Action Required]

Please review the details in the CRM and follow up accordingly.

Best Regards,

[Sales Manager]

33. Customer Segmentation Survey

Template Name: Segmentation_Survey

Purpose: Collect data for customer segmentation in the CRM.

Hi [Customer Name],

We are refining our customer services and would like to know more about your business.

Please answer a few quick questions:

1️⃣*What is your industry?*

2️⃣*How many employees do you have?*

3️⃣*What is your primary business challenge?*

Your responses will help us provide better support.

Thank you!

[Customer Success Team]

34. Inactive Account Outreach

Template Name: Inactive_Account_Outreach

Purpose: Reconnect with inactive accounts to re-engage them.

Hi [Customer Name],

We noticed you haven’t engaged with us for a while.

Please let us know if you’re still interested in:

1️⃣*Product Updates* - Stay informed about new features.

2️⃣*Discount Offers* - Receive exclusive discounts.

3️⃣*Account Closure* - Close your account if you’re no longer interested.

We value your relationship and look forward to reconnecting.

Best Regards,

[Customer Success Team]

35. Internal CRM Process Feedback

Template Name: CRM_Process_Feedback

Purpose: Gather internal feedback on CRM processes and workflows.

Hi [Employee Name],

We’re looking to improve our CRM processes and would love your feedback.

Please reply with:

1️⃣ *Process Efficiency* - How efficient are the current CRM processes?

2️⃣ *Suggestions* - Do you have any suggestions for improvement?

3️⃣ *Challenges* - Any challenges you’re facing with the CRM?

Your input will help us optimize our workflows.

Best Regards,

[CRM Admin Team]

36. Service Level Agreement (SLA) Violation Alert

Template Name: SLA_Violation_Alert

Purpose: Notify internal teams or customers about SLA violations.

Hi [Team/Customer Name],

An SLA violation has been detected in the case #[Case Number] related to [Issue/Service].

- **Response Time Exceeded:** [Duration]

- **Next Steps:** [Recommended Actions]

Please review the case in the CRM and take immediate action.

Best Regards,

[Support Manager]

37. Case Escalation Notification

Template Name: Case_Escalation

Purpose: Inform relevant stakeholders about escalated support cases.

Hi [Customer Name],

Your support case #[Case Number] has been escalated due to [Reason].

Our senior team is now looking into the issue, and we will provide you with an update soon.

Please reply with:

1️⃣*Status* - To get the current status.

2️⃣*Support* - To speak to a support manager.

We apologize for the inconvenience and thank you for your patience.

Best Regards,

[Support Team]

38. Lead Scoring Update

Template Name: Lead_Scoring_Update

Purpose: Notify sales reps about significant changes in lead scores.

Hi [Sales Rep Name],

The lead score for [Lead Name] has been updated to [New Score] based on recent interactions.

- **Reason for Update:** [Reason]

- **Recommended Action:** [Suggested Next Steps]

Please review the lead details in the CRM and prioritize accordingly.

Best Regards,

[Sales Operations]

39. Product Usage Alert

Template Name: Product_Usage_Alert

Purpose: Notify customers or internal teams about product usage patterns.

Hi [Customer Name],

We noticed that your usage of [Product/Service] has significantly [increased/decreased].

Please reply with:

1️⃣ *Discuss Options* - To discuss ways to optimize your usage.

2️⃣ *Support* - If you’re facing any issues.

3️⃣ *Ignore* - If no action is needed.

We’re here to ensure you get the most out of our services!

Best Regards,

[Customer Success Team]

40. Referral Program Invitation

Template Name: Referral_Invitation

Purpose: Invite customers to join a referral program.

Hi [Customer Name],

We’re excited to invite you to our referral program!

Refer friends or colleagues and earn rewards for each successful referral.

Please reply with:

1 *Join Now* - To join the program.

2 *More Info* - To learn more about the program.

3 *No Thanks* - If you’re not interested.

Thank you for being a valued customer!

Best Regards,

[Marketing Team]

41. Billing Issue Alert

Template Name: Billing_Issue_Alert

Purpose: Notify customers about billing discrepancies or issues.

Hi [Customer Name],

We have identified a discrepancy with your recent billing.

- **Invoice Number:** [Invoice Number]

- **Issue:** [Issue Description]

Please reply with:

1️⃣*Discuss* - To speak with a billing representative.

2️⃣*View Invoice* - To review the invoice details.

3️⃣*Support* - To connect with support for more information.

We apologize for any inconvenience and are here to assist.

Best Regards,

[Billing Team]

42. Customer Success Story Request

Template Name: Success_Story_Request

Purpose: Request customer participation in a success story or case study.

Hi [Customer Name],

We’re thrilled with the results you’ve achieved using [Product/Service] and would love to feature your success story.

Please reply with:

1️⃣*Yes* - To participate in a case study.

2️⃣*More Info* - To learn more about what’s involved.

3️⃣*No Thanks* - If you’re not interested.

Thank you for being a valued customer, and we look forward to sharing your success!

Best Regards,

[Marketing Team]

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