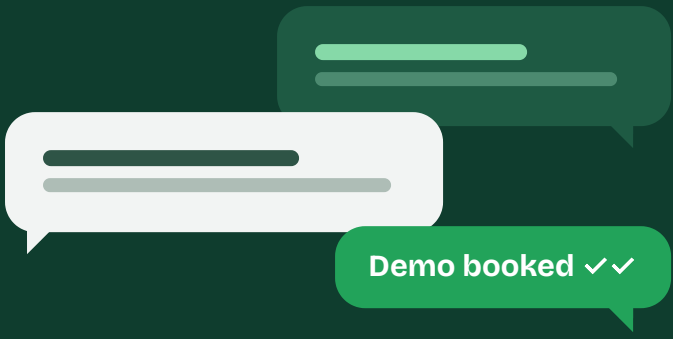
SAMWAD

WHITEPAPER · SAAS & B2B · 2026



WhatsApp for SaaS: Book More Demos, Activate Trials, Renew on Time

How SaaS and B2B companies use WhatsApp to reply to leads, book demos, guide trial users through setup, support customers and renew on time.

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5 stages
The customer journey, from lead to expansion

3 automations
The first ones to switch on, step by step

6 metrics
A scorecard for sales, success and support

30 days
A week-by-week launch plan

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EXECUTIVE SUMMARY

Leads, trials and renewals slip when the only channel is email.

SaaS teams run on email: demo invites, onboarding sequences, invoices. A lead may not see your email today, a trial user stuck on setup rarely writes in, and renewal notices sit in a finance inbox.

This guide shows how to run the customer journey on WhatsApp with SAMWAD: five stages from lead to expansion, the first three automations, sample templates and a 30-day plan.

In this guide

- The five-stage customer journey, with one number to watch at each stage
- Three automations: lead reply with demo booking, trial nudges and renewal reminders
- Sample Utility and Marketing templates, with buttons
- A scorecard, common mistakes and a 30-day plan

WHY NOW

The case for WhatsApp

Speed

A lead who gets a reply in the chat while still on your site can pick a demo slot there and then.

Activation

Trial users get help at the step they are stuck on, in the chat, without opening a ticket.

Renewal

An invoice and a pay link in the chat give the customer one less thing to chase.

The usual way

Email sequences and tickets. Demo invites wait in the inbox. Onboarding emails go out on a timer, whatever the user did. Support lives in a ticket queue, apart from sales.

On WhatsApp

One chat, lead to renewal. The lead books a demo in the chat, trial messages react to what users do in the product, YARA answers from your help docs, and renewals arrive with a pay link.

THE FRAMEWORK

The customer journey on WhatsApp

Most SaaS teams use WhatsApp for one step, if any. Run all five stages in one chat and sales, success and support see the same history in one shared inbox.

See the full customer journey:
samwad.tech/industries/whatsapp-for-b2b-saas

Stage 01

Lead

A lead fills in a form on your site or an ad.

SAMWAD: A WhatsApp reply to website and ad leads; a demo slot picked in the chat; lead and booking go to your CRM.

Watch: Leads to demos booked

Stage 02

Trial

A user signs up and starts setup.

SAMWAD: Messages triggered by what users do or don't do in the product; setup help and short guides; a call with the team when needed.

Watch: Trials that reach setup

Stage 03

Support

A customer has a question or a problem.

SAMWAD: YARA answers from your help docs; hard questions go to support with the full chat; one shared inbox for sales and support.

Watch: Questions answered without a ticket

Stage 04

Renewal

The subscription is due.

SAMWAD: Renewal reminders; invoices as PDFs; payment-due reminders with a link to pay.

Watch: Renewals paid by the due date

Stage 05

Expansion

An account is ready for more.

SAMWAD: Product updates for opted-in customers; upgrade offers for the right accounts; webinar invites with reminders.

Watch: Upgrades per 100 accounts

DESIGN RULE

Trigger on behaviour, not the calendar. Message a trial user about the step they skipped, not on day 3 because it is day 3.

PLAYBOOK

The first three automations to switch on

01 · Lead

Lead reply and demo booking

Trigger: a lead submits a form on your site.
Message: a short reply and a choice of demo slots in the chat.
Next: the lead and booking go to your CRM.

Watch: leads to demos booked

02 · Trial

Trial nudge

Trigger: a trial user hasn't finished a key setup step.
Message: a short guide for that step and an offer of a call.
Next: they finish, or reply and your team helps.

Watch: trials that reach setup

03 · Renewal

Renewal reminder

Trigger: a set number of days before renewal.
Message: the renewal date, the invoice as a PDF and a pay link.
Next: a payment-due reminder if it is unpaid.

Watch: renewals paid by the due date

SAMPLE TEMPLATES

What the messages look like

Illustrative examples. Each {{1}}, {{2}} is a variable filled in for each customer.

ILLUSTRATIVE

Hi {{1}}, your {{2}} demo is booked for {{3}}. Join from this link at the time: {{4}}

Reschedule

Utility template · demo_confirmation

ILLUSTRATIVE

Hi {{1}}, your {{2}} workspace is almost ready. The next step is {{3}}. This short guide shows how: {{4}}

Can someone do this with me on a call?

Utility template · setup_step_pending

ILLUSTRATIVE

Hi {{1}}, we’re running a 30-minute webinar on {{2}} on {{3}}. Tap below to save your seat.

Register

Stop updates

Marketing template · feature_webinar (opted-in only)

Which template is which

Demo confirmations, setup steps, invoices and payment reminders are **Utility** templates: account information only, no upsell. Product news, upgrade offers and webinars are **Marketing** templates, sent only to people who opted in. After a user messages you, you can reply freely for 24 hours; then you need an approved template.

SAGE, SAMWAD's AI advisor, checks templates against Meta's rules before you submit.

WHAT GOOD LOOKS LIKE

What good looks like

Track a few numbers from week one, so sales, success and support can see what WhatsApp is doing at each stage.

Your scorecard

Lead-to-demo rate Demos booked ÷ new leads	Weekly
Demo show-up rate Demos attended ÷ demos booked	Weekly
Trial activation Trials that finish key setup ÷ new trials	Weekly

Answered without a ticket — Weekly

Questions YARA answered ÷ all questions

On-time renewals — Monthly

Renewals paid by the due date ÷ renewals due

Opt-out rate — After each campaign

Opt-outs ÷ marketing messages sent

Common mistakes

- Sending trial messages on a fixed schedule, whatever the user did
- Letting the bot answer billing disputes instead of handing them over
- Keeping sales and support chats in separate tools
- Sending product news to users who never opted in

Where to start

Pick the stage where you lose the most: leads that never book, trials that never set up, or renewals paid late. Automate that one first, then add the next.

YOUR FIRST 30 DAYS

A 30-day launch plan

WEEK 1

Connect and approve

Connect your WhatsApp Business number and your CRM. Submit demo, setup and invoice templates to Meta.

WEEK 2

Reply to leads

Switch on the lead reply and demo booking in the chat for website and ad leads.

WEEK 3

Activate trials

Send product events through the API or webhooks. Turn on nudges for the setup steps users skip.

WEEK 4

Support and renew

Load your help docs into YARA. Switch on renewal and payment-due reminders. Review the scorecard.

Before week 1: your systems

Connect your CRM, billing and product through ready-made integrations, the API, webhooks or Zapier. List the three setup steps that matter most for a new account.

BEFORE YOU GO LIVE

Consent and content checklist

- [ ] **Opt-in:** ask on your sign-up or lead form, say what you'll send, and keep a record.
- [ ] **Template categories:** demos, setup steps and invoices as Utility; product news and offers as Marketing.
- [ ] **Opt-out:** add a "Stop updates" button to Marketing templates and act on it straight away.
- [ ] **Quiet hours:** message in your customers' working hours, not late at night or early in the morning.
- [ ] **Handover:** billing disputes, bugs and cancellations go to a person with the full chat.

Five questions to ask any WhatsApp platform

1. Is it built on the official WhatsApp Business API?
2. Can product events trigger messages through an API or webhooks?
3. Can the AI agent answer from our own help docs?
4. Do sales and support share one inbox and one history?
5. Will someone help me write templates and get them approved?

Book your next demo on WhatsApp this week.

Book a demo and we'll set up your first automation from this guide with you, or start a free trial.

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