Moving a service into WhatsApp

A playbook for executives: choose the first process, run a pilot that proves something, and measure it honestly.

w2a · Everything. One chat away.

Pardus Solutions (Pvt) Ltd · www.w2a.co.zw · October 2026

WHY THIS, WHY NOW

Your people are already in the chat

Most of the people your organisation serves already use WhatsApp every day. Asking them to download an app, create a login or come in to a counter adds steps where they give up. A WhatsApp digital service meets them where they already are.

What has changed is **WhatsApp Flows**: app-like screens that open inside the chat, with dropdowns, date pickers, uploads and validation. Free-text chat is good for starting a conversation; Flows are how you finish a transaction cleanly.

- **No app to download** for the people you serve.
- **Guided screens, not free text**: fewer errors, less back-and-forth.
- **Your systems stay in charge**: the chat is a new front door, not a new database.
- **Status comes to them**: confirmations, reminders and receipts arrive in the same chat.

The pattern behind almost every journey

Step	What happens	Example
1. Identify	Recognise who is asking, with consent, once.	Patient number or ID verified
2. Capture	A Flow collects exactly the fields the process needs.	Claim details and photos
3. Pay & sign	Payment and, where needed, a signature, inside the chat.	Licence fee, agreement
4. Receive	Confirmation, document or status, in the chat.	Receipt, certificate, slot

STEP 1

Choose the first process in one meeting

The first process decides whether the pilot proves anything. Pick one that is frequent, painful and measurable, owned by one person, and touching one system. Score your candidates below and start with the highest total.

Criterion	1 point	3 points
Volume	A few requests a week	Hundreds or thousands a month
Pain today	Works fine	Queues, calls chasing status, repeat visits
Rules	Many judgement calls	Clear rules and required fields
Ownership	Several departments	One process owner who can decide
Systems	Many systems to change	One system of record (or a spreadsheet)
Measurability	No baseline exists	You can count requests, time and cost today

Good first candidates

- **Clinics:** appointment booking and reminders, results notification, repeat prescriptions.
- **Registries and government:** application start, document upload, slot booking, status.
- **Education:** admissions enquiries, fee statements, registration.
- **Insurance:** first notice of loss with photos, policy documents, renewals.
- **Commerce:** orders, quotations, delivery updates and receipts.

Avoid as a first pilot: processes that need several departments to change at once, anything without a clear owner, and journeys whose success you cannot count.

STEP 2

Design the journey: chat starts it, a Flow finishes it

Map the journey on one page before anything is built. For each step, decide whether it is a chat message (short, conversational) or a Flow screen (structured input). Keep each Flow to the fields the process truly needs.

Use the chat for	Use a Flow for
Greeting, menu, quick questions	Forms with required fields and validation
Status updates and reminders	Choosing a date, slot, branch or product
Hand-over to a person	Uploading documents and photos
Receipts and documents	Reviewing and confirming before submitting

Design rules that save pilots

- Ask for each piece of information **once**; reuse what you already hold.
- Take the payment **inside the chat or the Flow**; keep a secure payment link only as the fallback.
- Always offer a way to reach a person, and say when they will answer.
- Send status before people ask for it: every update you push is a call you do not take.
- Write in plain language; test every screen on a basic phone and a slow connection.

STEP 3

The pilot checklist

Area	What you need before go-live
People	A sponsor who decides, a process owner, frontline staff trained, a named support contact.
Systems	Access to the one system the pilot touches (API, export or a shared sheet), test data.
WhatsApp	A WhatsApp Business number, verified business, approved message templates; Meta reviews Flows.
Payments	Your payment provider's API for in-chat payment, a fallback link, and how payments are reconciled.
Data	Consent wording, retention period, who can see what, a privacy notice link in the chat.
Scope	A defined group (one branch, one product, one intake) and a start and end date.

STEP 4

The questions your board and regulator will ask

Have the answers ready before the pilot starts. They are also the questions to put to any vendor.

Question	What a good answer looks like
Who can see the data?	Role-based access for staff; each organisation's data kept separate.
Can we prove what happened?	Consequential actions are time-stamped and attributed (an audit trail).
Did people agree?	Consent captured in the journey and stored with the record; opting out is easy.
Where is the data?	Clear statement of what is stored where, and for how long.
What if WhatsApp is down?	A fallback (web link, call centre, counter) and status messages when it is back.
What does it cost to run?	One-off build, recurring platform cost and Meta's messaging charges, shown separately.
Can we leave?	Your data exportable in a usable format; your system stays the system of record.

STEP 5

Measure: before, during and after

Write down the baseline **before** go-live; without it, no result is believable. Then review at 30, 60 and 90 days and decide with the numbers.

Measure	How to count it
Completion rate	Journeys finished ÷ journeys started, per step, to see where people drop off.
Time to outcome	From first message to booking, approval, document or payment.
Status calls avoided	Calls and visits asking 'where is my request?', before vs after.
Cost per transaction	Staff time plus paper, SMS and call costs, before vs after.
Payments reconciled	Share of payments matched automatically to the right record.
Satisfaction	One-tap rating at the end of the journey.

AVOID THESE

Seven mistakes that sink pilots

1. Starting with the most complex process because it is the most visible.

2. Copying a paper form screen by screen instead of asking only what is needed.

3. No baseline, so success is a matter of opinion.

4. No owner for the replies: people write back and nobody answers.

5. Treating WhatsApp as a broadcast channel; send what people asked for, when it helps them.

6. Scaling to every branch before the first one works.

7. Leaving staff out: the people who run the process today design the best journey.

NEXT STEP

A free Opportunity Assessment

Bring one process. In a working session we map the people, systems and controls, sketch the journey, and agree what to measure. You leave with an opportunity map and a scoped pilot proposal that shows what is one-off, what recurs and what Meta charges for messaging.

Try it on your phone

Scan the code: WhatsApp opens a chat with w2a, which sends you a live WhatsApp Flow. It takes about two minutes, and at the end you can book a 20-minute walk-through with the team.

Book your assessment: www.w2a.co.zw · **WhatsApp:** +263 73 456 8470 · **Email:** info@w2a.co.zw

This playbook is general guidance, not legal or regulatory advice. Results depend on your process, systems and people. © 2026 Pardus Solutions (Pvt) Ltd. w2a is a product of Pardus Solutions. WhatsApp is a trademark of WhatsApp LLC; w2a is not affiliated with or endorsed by Meta.