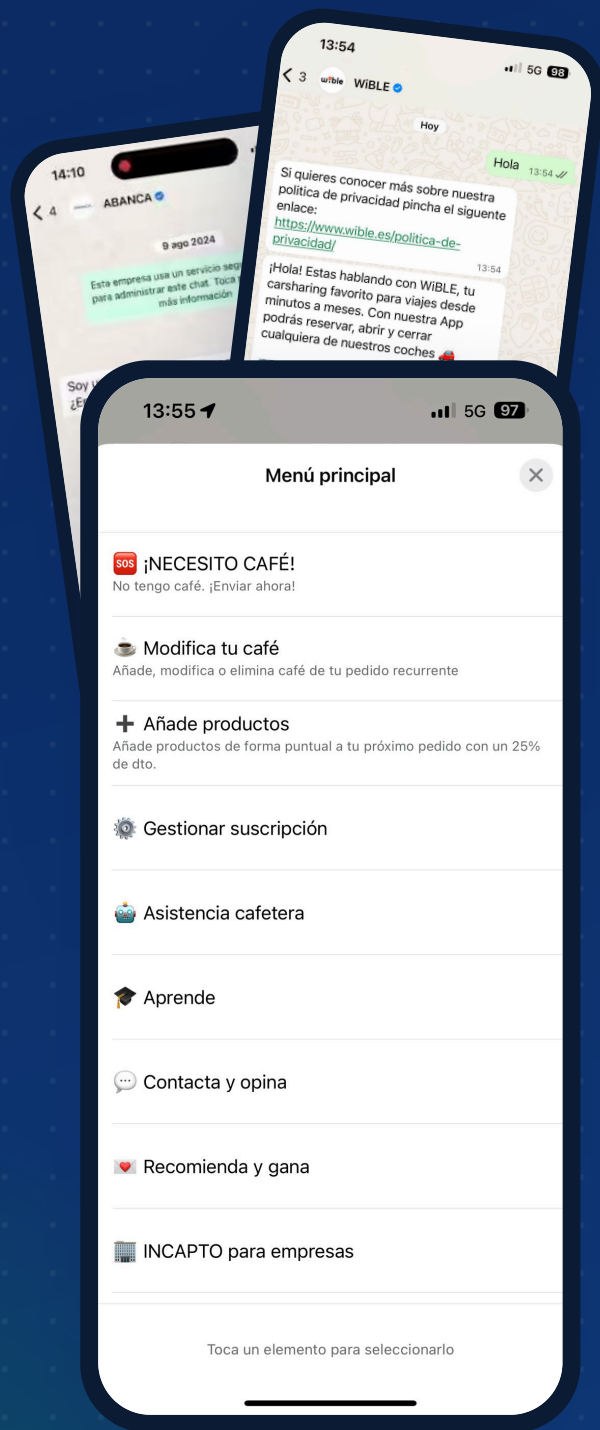
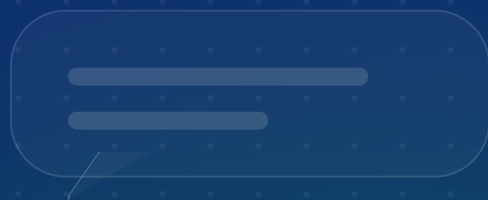


 EBOOK · WHATSAPP BUSINESS

From broadcast to agent.

The 2026 WhatsApp playbook. Proactive templates, guided flows, AI agents that act and a Contact Center, all in one thread.

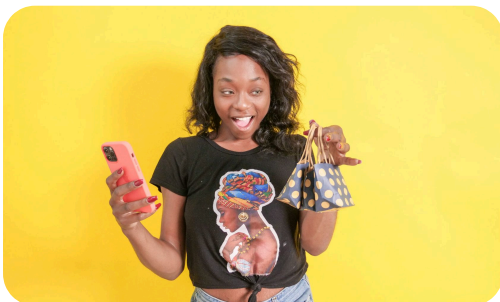
 Activate Guide Assist Resolve

INSIDE THIS GUIDE

Every company uses WhatsApp. Few use it well.

WhatsApp is the channel customers in Spain and LatAm actually answer. This guide shows how to turn it from a notice box into one thread where you sell, serve and build loyalty.

01	Why WhatsApp, why now	03
	The channel people answer, and the 2026 rule changes	
02	The 4-step model	05
	Activate, guide, assist and resolve in one thread	
03	Proactive activation	06
	Marketing, utility and authentication templates	
04	Guided flows	08
	WhatsApp Flows and decision trees	
05	GenAI assistant	10
	LLM plus RAG, and AI agents that act	
06	Contact Center	13
	Human hand-off and a unified inbox	
07	Platform and 30-day plan	14
	Where WhatsApp fits, and how to go live	



Who this is for: CRM, ecommerce, digital and customer service teams that already send WhatsApp messages and want better results at a controlled cost under Meta's new pricing.

— WHY WHATSAPP, WHY NOW

The channel people answer. Usually used badly.

Your customers already live in messaging apps. They expect two-way conversations in real time. Most brands still treat WhatsApp as a place to push offers and walk away.

96%

WhatsApp penetration in Spain

+98%

Open rate

56-67%

Interaction rate

85%

Prefer a company to contact them by messaging

Market figures as cited in indigitall's customer materials. Sources: Meta, Gartner, Forrester.



01

Broadcast habits

Mass sends with no segmentation. Meta now paces delivery by quality, so poor campaigns get throttled.



02

A new cost model

Billing is per message, and from 1 October 2026 service replies are billed too. Waste now shows up on the invoice.



03

A silo

Standalone chat tools have no CRM and no journeys. WhatsApp never connects to the rest of the customer story.

THE SHIFT

From mass campaigns to conversations. Your customers' favourite channel stops being a notice box and becomes a two-way conversation.

META'S 2026 RULES

The rules changed. So does the math.

Since 1 July 2025 Meta charges per template delivered, by category. On 1 October 2026 a second change lands: business replies inside the service window are billed per message too.

Category	What it covers	How it is billed from 1 Oct 2026
Marketing	Promotions, news, cart recovery. Always with opt-in.	Per template delivered, at the highest rate
Utility	Confirmations, shipments, appointments, alerts	Per template delivered, at a fraction of the marketing rate
Authentication	OTP codes and verification without SMS	Per template delivered. OTP-only flows are unaffected by the October change.
Service	Bot or agent replies after a customer writes	New: per message, about USD 0.03 per reply after 1,000 free service messages
Customer messages	Anything the customer sends you	Free

Check Meta's current rate card for your market before you budget.

Five more 2026 changes

-  Pacing is governed by quality rating
-  About two marketing messages per user per day, across all brands (error 131049)
-  The Marketing Messages API is generally available
-  Flows now work on WhatsApp Web too
-  Meta's own AI agent has been available worldwide since June 2026

How indigitall contains cost

-  Flows collapse multi-step capture into one billable message
-  Bot prompts are consolidated
-  Long conversations can move to web chat
-  Response loops after a broadcast are blocked
-  Every category is monitored in the console

TRACK INSTEAD

← Response rate

☐ Windows opened

⊘ Blocks

🗣️ Cost per useful conversation

02

THE 4-STEP MODEL

One thread to sell, serve **and build loyalty.**

indigitall runs WhatsApp in four connected steps. Each one hands the customer to the next without losing context, so the conversation never breaks.

01

Proactive activation

Inform, remind, recover.

-  Marketing
-  Utility
-  Authentication

02

Guided flows

Capture, qualify and sell inside the chat.

-  WhatsApp Flows
-  Decision trees

03

GenAI assistant

Answers with your data. Acts on your systems.

-  LLM plus RAG
-  AI agents that act

04

Contact Center

From bot to agent without losing the thread.

-  Human hand-off
-  Unified inbox

01 PROACTIVE ACTIVATION

Inform, remind, **recover**.

Meta-approved templates sent from your CRM or the indigitall console, with variables, attachments, tracked buttons and quick replies.



Marketing

Promotions, news and cart recovery. Always with opt-in.

Your cart is saved. Your size is still in stock.

[View my cart](#)



Utility

Confirmations, shipments, appointments and alerts.

Your appointment is tomorrow at 10:30.

[Confirm or reschedule](#)

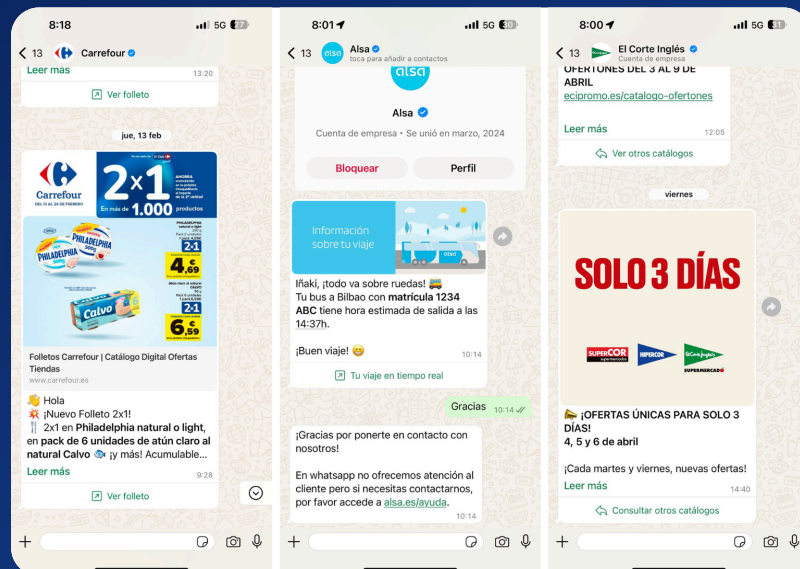


Authentication

OTP codes and verification without SMS.

482 913 is your verification code. Do not share it.

[Copy code](#)



Proactive WhatsApp in production: a catalog offer, a real-time trip update and a limited-time campaign

ENTRY

Click-to-WhatsApp ads open the thread

JOURNEYS

Cart triggers from Shopify, VTEX or Magento

TRACKING

Tracked buttons with UTMs to GA4

— THE PROACTIVE PLAYBOOK

Earn the right **before** you write.

- 1 Earn the opt-in first.** Consent collected at the right moment, and synced automatically in and out.
- 2 Segment first.** Meta will throttle a campaign with poor quality signals.
- 3 Write templates that get approved and read.** One idea, one clear action, real variables.
- 4 Utility first.** Confirmations and alerts are the messages customers do want.
- 5 Let the user decide frequency.** Fewer, better messages protect your number.
- 6 The message after is worth more.** Post-purchase and NPS keep the thread alive.



EDUCATION · MEXICO

Universidad Anáhuac

"WhatsApp campaigns that increased conversion by 182%."

+182%

Conversion

84%

Open rate

+79%

Lead capture

+65%

Appointments



RETAIL · COLOMBIA

Flamingo

"They stopped sending campaigns.
They started conversing." Segmented,
multichannel WhatsApp.

+8%

Revenue

#1Traffic source
after launch

EDUCATION · PERU

UCV

WhatsApp CTR by targeting filter. Tighter
targeting, more clicks.

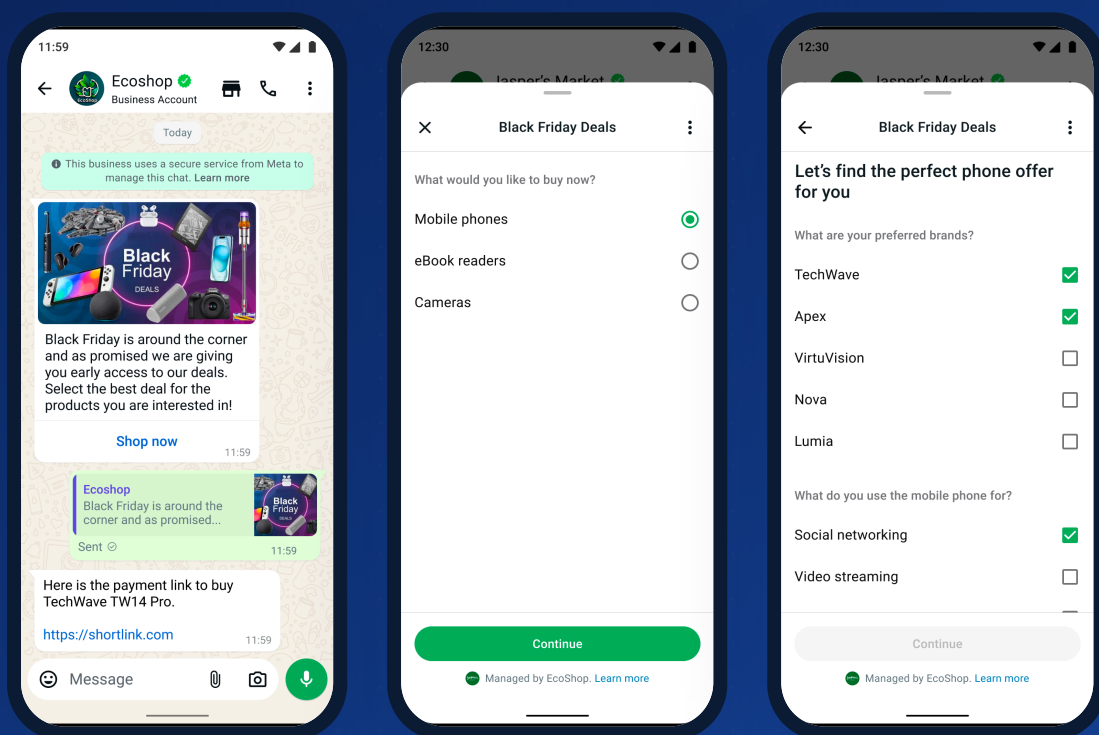
6.12%**5.44%****4.65%****3.97%**

Data attributed to real customers, not a guarantee.

02 GUIDED FLOWS

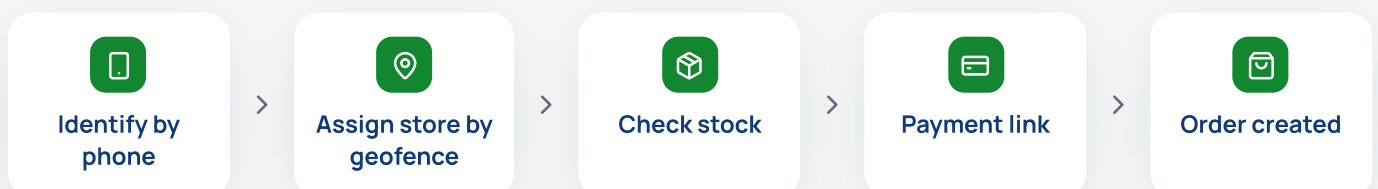
Buttons and forms, not free text.

WhatsApp Flows put native forms inside the chat. Quick-choice menus adapt to each answer, for promos, capture, qualification and NPS. The customer sees the product, then orders and pays without leaving the chat.



From campaign to category, preferences and payment link, in one chat

CONVERSATIONAL COMMERCE, STEP BY STEP



 **Guided bot**
A decision tree for critical, repeatable processes

 **Hybrid bot**
Guided rails plus an AI assistant for open questions

 **One billable message**
A Flow collapses multi-step capture into one

— GUIDED FLOWS IN PRODUCTION

Fewer calls. **More done in the chat.**

**HEALTHCARE · SPAIN**

"\$114k in expected revenue. 50% fewer inbound calls. On WhatsApp Flows."

WhatsApp Flows plus two AI bots for a hospital group that serves more than 7M patients a year.

+\$114K

Expected revenue

-50%

Inbound calls

makro**WHOLESALE · SPAIN**

Membership cards scanned with OCR over WhatsApp.

+40%

Sign-ups

1.3M+

WhatsApp users reached

BED BATH & BEYOND**RETAIL · MEXICO**

Bed Bath & Beyond Mexico: 40 flows on one number, with inventory and shipping APIs and 24/7 hand-off.

40

Communication flows

4,000+

Users in 6 months

gandhi**BOOKSTORES · MEXICO**

Librerías Gandhi: a bot that knows what is on the shelf, in real time.

55K+

Active users

50+

Flows, plus 15K+ proactive messages



Start where volume is high and answers are predictable: bookings, order status, stock and sign-ups. That is where guided flows remove the most calls and the most messages.

Data attributed to real customers, not a guarantee.

03 GENAI ASSISTANT

It is not a rules bot. It is an agent.

LLM plus RAG on your catalog and your systems. It answers with your data, without hallucinations. It recommends, resolves and qualifies, then escalates to a human.



In production at ABANCA, Atlético de Madrid, Wible and Bankinter



Strict RAG on your content

Trained from your sitemap, URLs, PDF, TXT and CSV, with a scheduled refresh



PII guardrails

Sensitive data is anonymized before processing. No conversation trains external models.



Acts via MCP

Works on CRM, ERP, ecommerce and payment APIs, with memory and planning



Smart Governance

Token limits per client, with alerts at 80% and 100%

PATHBOT: THREE MODES, ONE PLATFORM

Classic

Guided rails for critical processes

LLM

Generative AI for open questions

Hybrid

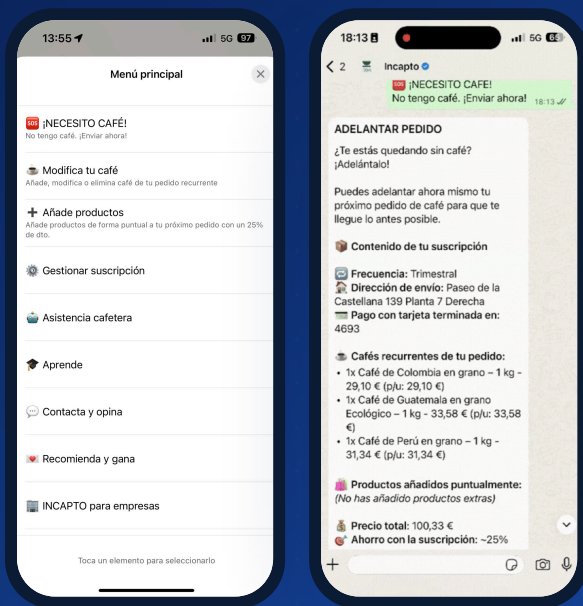
Both together. Grow without rebuilding.

INCAPTO

COFFEE SUBSCRIPTION · SPAIN

A WhatsApp button, recurring revenue.

Incapto runs its generative AI agent IWA on WhatsApp, with RAG on its own content, plus a Panic Button that reorders coffee in one tap.

**70%**

of bot chats resolved without a human

+50%LTV, activated
customers**-56%**

Churn

€30KMRR from the Panic
Button**+18%**

Order frequency

+10%

Average order value

+11%Recurring orders
from the Panic
Button**10K+**Quarterly active
users**48%**Adoption among
active subscribers

"They turned a WhatsApp button into recurring coffee revenue."

Incapto case study, indigitall

Data attributed to a real customer, not a guarantee.

— AI AGENTS IN PRODUCTION

Banking, mobility, health. **Same thread.**

//ABANCA

BANKING · SPAIN

"A generative AI banking bot
that users rated 4.5 out of 5."

A GenAI assistant on WhatsApp, available 24/7 and multilingual.

4.5/5

User rating



CARSHARING · SPAIN

"34% fewer unclaimed reservations.
Direct bookings via WhatsApp."

-34%

Unclaimed reservations

300K+

Users

 **Sanitas**

HEALTHCARE · SPAIN

"60% fewer no-shows. +50%
confirmations. One patient flow."

The GenAI bot Sania on WhatsApp, plus CDP-driven reminders across
WhatsApp, SMS and push.

-60%

No-shows

+50%

Confirmations

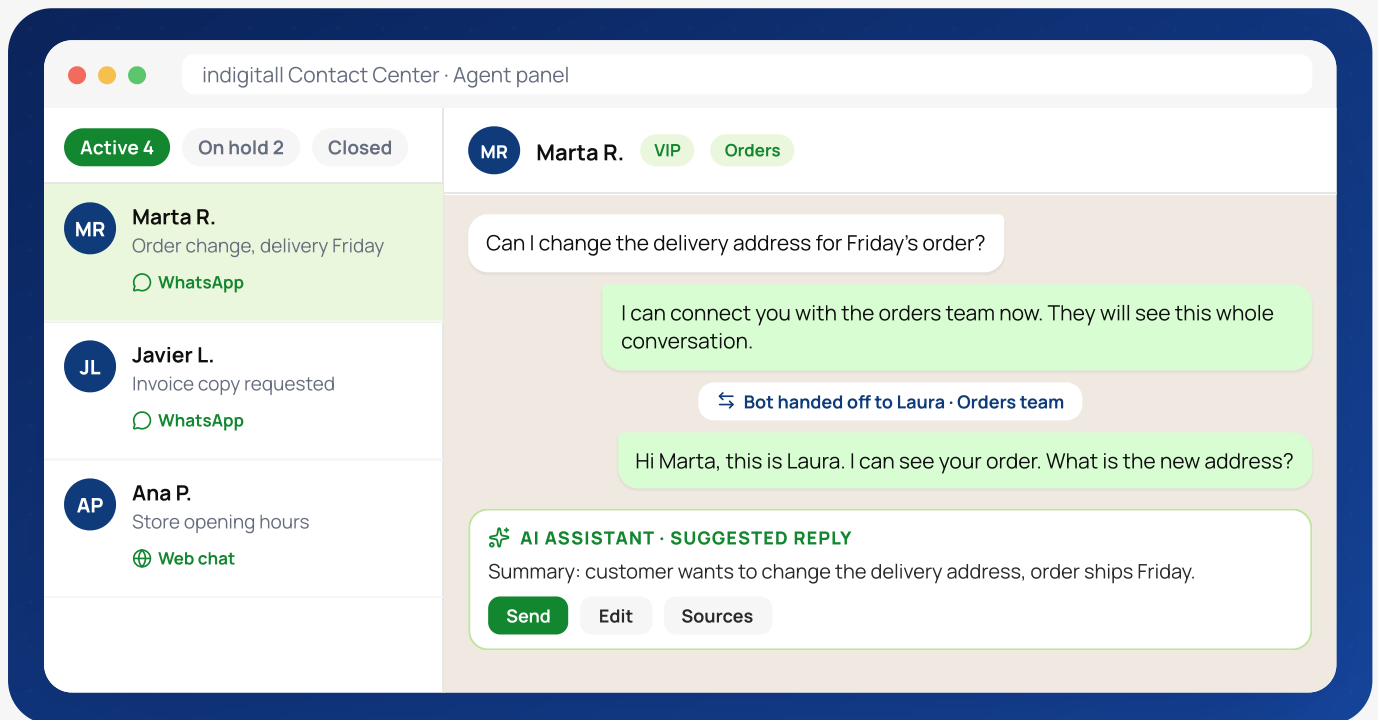
Data attributed to real customers, not a guarantee.

04

CONTACT CENTER

Bot to agent. Same thread.

AI bots and human agents work as one team. The agent gets the full history and profile, and closes the sale or the incident in the same thread.



Smart routing

By shift, language or specialty



Tags to the CDP

Agent tags update the profile in real time



Always covered

Business hours, holidays and auto-reassignment



PREMIUM BAKERY · SPAIN Pastelería Mallorca

"57,000 orders. One thread. Zero hold music."
Ordering bot with a dedicated path to a human.

57K+

Order
conversations

77.3%

NPS



EDUCATION Academia Pitágoras

An enrolment channel on WhatsApp with live-chat hand-off to advisors.

90%

Open

98%

Delivery

80%

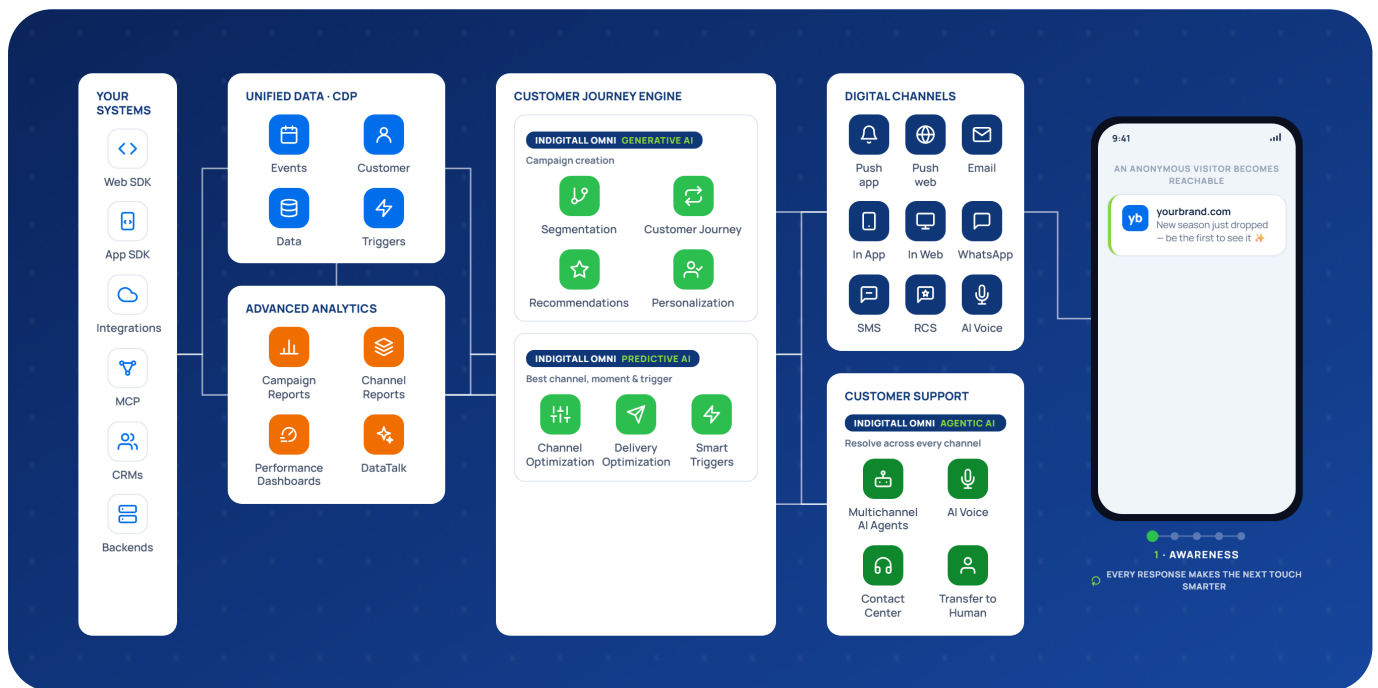
Read

Data attributed to real customers, not a guarantee.

— HOW indigitall WORKS

WhatsApp is one step. The journey wins.

BSP, CDP and Journey in one vendor. WhatsApp becomes a step in a multichannel flow, and the Meta cost story is handled in the platform, not in a spreadsheet.



Meta

Business Partner

Official Meta Business Solution Provider since 2019.

- ✓ Verified badge, template approval and quality-rating protection
- ✓ Direct escalation to Meta, separate DEV and PROD lines
- ✓ BSP migration with about 30 minutes of downtime, off hours

G2 RANKINGS

#1

WhatsApp Marketing Software, highest rated in Europe

#3

WhatsApp Marketing Software, global

 CHANNELS

18+

 MESSAGES A MONTH

1B+

 COUNTRIES

20+

 ENTERPRISE CLIENTS

215+

— YOUR 30-DAY PLAN

From first template to first hand-off.

Week 1 · Set up

- ✓ Onboard or migrate your number to indigitall as BSP
- ✓ Request the verified badge and approve core templates
- ✓ Sync opt-in and opt-out with your CRM

Week 2 · Activate

- ✓ Go live with utility templates first
- ✓ Segment marketing sends by CDP profile
- ✓ Open a Click-to-WhatsApp entry point

Week 3 · Guide

- ✓ Replace free-text capture with a WhatsApp Flow
- ✓ Launch a guided bot for the top requests
- ✓ Add email or SMS fallback in the journey

Week 4 · Assist and resolve

- ✓ Start training the GenAI agent on your sitemap and PDFs
- ✓ Set routing, hours and hand-off in the Contact Center
- ✓ Review cost by category against the October model

Build time is about two weeks for a rule-based agent and about four weeks for a generative one.

MEASURE CONVERSATION, NOT DELIVERY

Delivery tells you a message arrived.
Conversation tells you it worked.

 RESPONSE

Replies per
template sent

 WINDOWS

Conversations
opened

 BLOCKS

Users who opt out
or block

 COST

Per useful
conversation

NEXT STEP

Your customers already answer. **Start the conversation.**

See how indigitall runs proactive templates, WhatsApp Flows, AI agents and the Contact Center on your own number and data, under the October 2026 pricing.

 **Book a demo**

 **indigitall.com**