The WhatsApp Prospecting Playbook:

How top Sales teams use WhatsApp to close deals faster

Most reps stick to email and LinkedIn. WhatsApp's your edge.
Use this playbook to get ahead before everyone else.



www.lemlist.com

Table of contents

Why WhatsApp Works for Sales 01

5-Step Guide to Winning with WhatsApp 02

Step 1: Set Up for Success 02

Optimize your profile

Warm up your sending activity

Step 2: Add WhatsApp Smartly Into Your Multichannel Strategy 02

Top 5 ways to use WhatsApp in your outreach 03

Step 3: Write Messages That Get Replies 04

Copy tips: Dos & Don’ts

Best formats for every moment

Step 4: Stay Safe & Avoid Getting Blocked 05

WhatsApp limits (and how to avoid them)

Step 5: Track What Works & Improve Fast 06

Key metrics to follow & how to react

Quick Recap 06

Bonus tip: Scale Your WhatsApp Prospection with lemlist 07

Why WhatsApp Works for Sales

You did the hard part. Your cold email landed. You got a reply. Maybe even ran a solid first call. But then... silence.

No follow-up response. No-show for the demo. That promising momentum? Lost.

This isn't an outreach problem. It's an attention problem.

Even warm, interested prospects go silent. Sales teams are left chasing ghosts after doing everything right.

We often hear them saying: *"It's not the cold outreach that's broken. It's the follow-through. That's where we lose the deal."*

That's why, to keep pipeline moving, top reps are turning to WhatsApp.

Not for cold outreach, but to stay top-of-mind when timing matters most.

Why WhatsApp?

→ It breaks through the noise

Inboxes are overflowing. LinkedIn is getting more and more cluttered. WhatsApp is still untapped, where your message gets seen immediately.

→ It builds real relationships

When done right, it doesn't feel like another touchpoint in a sequence. It feels like a quick, human nudge. Informal. Personal. Trusted.



"WhatsApp being a conversation tool made me more precise and straight to the point. Also, I always got replies (I feel people tend to reply more on WA because it's more "human friendly")."

John Attar, Senior Account Executive @ Lusha

From reminders to check-ins, WhatsApp helps sales reps re-engage warm leads and accelerate pipeline, without being spammy.

Heads up: WhatsApp is a sensitive channel. You only get one shot to make it count. Unlike mass cold emails or LinkedIn outreach, this is about true personalization that continues real conversations.

In this playbook, we'll show you how.

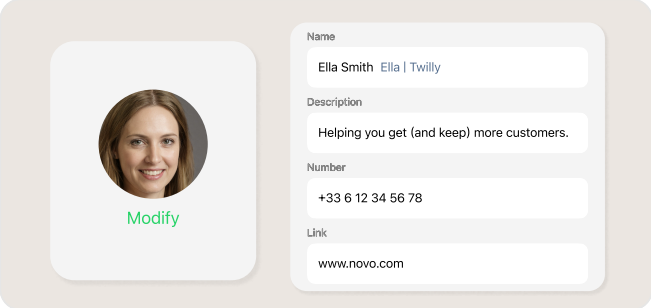
5-Step Guide to Winning with WhatsApp

Step 1: Set Up For Success

→ Optimize your profile

Before you send a message, your profile needs to look real, active, and trustworthy. Here's how to set up your WhatsApp so prospects feel safe to reply.

- [ ] Use real name (or your first name + company)
- [ ] Upload high-quality photo
- [ ] Add description that speaks your intention
- [ ] Link to a relevant website



→ Warm up your sending activity

Sending too many messages too fast can get you flagged or blocked.

To stay safe, you need to "warm up" your account, by slowly increasing your message volume in a way that feels human and natural:

- [ ] Start with just 3 - 5 new contacts per day
- [ ] Increase very gradually (think 5 → 7 → 10 per day)
- [ ] Don't jump more than 10–15% in volume week over week

Step 2: Add WhatsApp Smartly Into Your Multichannel Strategy

WhatsApp isn't for first touches. It's for leads who already know you, after the email, LinkedIn message, or call.

Used in follow-up, it's a natural next step: personal, direct, and more likely to get a reply.

Stick to 1-2 WhatsApp steps per campaign, max one message per day. Anything more risks feeling spammy and getting blocked.



"Don't be limited solely to WhatsApp. Some people reply to my messages with "let's talk through LinkedIn". Others just ignore. The hope is that a lot will reply to your WhatsApp messages, but for those who don't, talk to them where they will listen to you."

Qaiq Alves, GTM @ElevenLabs

5-Step Guide to Winning with WhatsApp

→ Top 5 ways to use WhatsApp in your outreach

For example, here are 5 use cases where WhatsApp can help you engage your prospects in real time and shorten sales cycle:

Play 1: Prospect booked a meeting and you want to ensure they show up

Hey [First Name]! Just confirming our chat tomorrow at 3pm. Excited to show you how [value point, e.g., you can fill your pipeline faster]. Let me know if you'd prefer a different time - happy to adjust! 11.04 ✓✓

Goal: Reduce no-shows with a friendly, value-driven reminder.

Tips:
- Mention date/time clearly
- Reinforce the benefit of joining
- Make rescheduling easy

Play 2: Prospect didn't show up on a meeting

Hey [First Name], looks like we missed each other earlier. Totally understand things can get hectic. Let me know if you'd like to reschedule. Happy to make time when it works best for you. 11.04 ✓✓

Goal: Re-engage without pressure.

Tips:
- Be polite and understanding
- Offer a clear path to reschedule
- Keep the tone warm and casual

Play 3: Prospect ghosted after demo/proposal

Hey [First Name]! Just checking in after our demo last week. Did anything come to mind? Happy to clarify or share more if helpful. No rush at all! 11.04 ✓✓

Goal: Stay top of mind without sounding pushy.

Tips:
- Mention the last interaction directly
- Keep it light, open-ended
- Invite questions or feedback

Play 4: Prospect changed companies and could benefit from your solution

Big congrats on the new role at [New Company], [First Name]! 🎉 We did some great work together at [Old Company]. Curious what you're focused on now. Think there's a chance we could help again? 11.04 ✓✓

Goal: Rebuild the connection and open a new opportunity.

Tips:
- Start with a genuine congrats
- Reference your past success
- Open the door for a new conversation

Play 5: You have valuable updates for well-known prospect

Hi [First Name]! We spoke a few months ago about [topic]. Just wanted to let you know we've launched [new feature]. Thought it might help with [specific pain point]. Want to catch up and see if it fits? 11.04 ✓✓

Goal: Reignite interest with a relevant update (new feature, social proof, etc.)

Tips:
- Reference your past conversation
- Highlight what's new and relevant
- Keep the ask low-pressure and helpful

Step 3: Write Messages That Get Replies

Whether you're confirming a meeting, following up after a call, or sharing something helpful, your message should feel like it came from a real person... not a script.

→ Copywriting tips: Dos & Don'ts

Don't:

- **Pitch cold**. WhatsApp is for warm follow-ups, not first contact.
- **Send back-to-back messages**. One per day if you don't get reply, max.
- **Copy-paste the same message to everyone**. Mix it up to stay authentic.
- **Include links** unless essential. They are often associated with spam.
- **Overuse the channel**. 1-2 WhatsApp steps per campaign is enough.

Do:

- **Keep it short and clear**. Aim for up to 3 short sentences.
- **Sound natural**. Write like you talk - no buzzwords or stiff sales copy.
- **Reference context**. Mention your last chat, call, or shared resource.
- **Be helpful**. Offer value, not pressure. Think: reminder, update, check-in.
- **Personalize**. Use first names, shared details, or company references.



"Short, casual messages that feel human. Regular touchpoints, not sales pitches. Always being available for a quick call. That's what worked (and still works)."

Tarek Boullegui, Area Sales Manager @ EasyMile

→ Best formats for every moment

Keep in mind that not every message needs to be a text, especially if you already exchanged texts. Choosing the right format can make your outreach more engaging.

Format	Best for
Text	Quick check-ins, meeting reminders, or light follow-ups. Ideal when you want to stay top of mind without overloading the conversation.
Voice	Intros, reviving conversations, or adding a personal touch when tone matters. Great when text alone might feel too flat.
Image	Sharing visual context, like product screenshots, stats, or teasers. Helps simplify complex points and adds variety to your outreach.
Video	Personal intros, quick demos, or explanations that benefit from your voice and expression. A strong way to stand out.
Document	Sharing detailed content, like proposals, contracts, or case studies, especially when you're further along in the conversation.

Step 4: Stay Safe & Avoid Getting Blocked

WhatsApp is powerful for outreach, but it also comes with strict guidelines. Sending too many messages too fast, or using spammy tactics, can get your account flagged or even blocked.



"You must set limits and pacing. Operators will block you without warning if you act like a bot even if you're not one."

-Jêrome Tabouis, Founding Director @ 911.Ops

→ WhatsApp limits (and how to avoid them)

Limitation	Best practice
New account	For accounts under 1–2 weeks old, start with 3–5 new contacts/day. Gradually scale up.
Daily sending volume	Even for warm accounts, keep it under 20 new messages/day to start. Scale slowly based on engagement.
Sudden volume spikes	Avoid jumping from 10 to 100 messages overnight. Increase gradually (e.g., +10–20/day)
Attachments	Avoid sending links, PDFs, images, or audio in your first message. Use text-only until trust is established.
Wrong timing	Messaging outside working hours increases chances of being reported. Stick to 9am–6pm local time.
Low engagement	Low reply rates hurt your sender reputation. Aim for 25–40% response rate to stay safe.
Spam reports	Multiple "Report Spam" actions = high risk of being banned. Stay relevant and human.
Opt-outs	There's no unsubscribe link on WhatsApp. If someone asks you to stop messaging, don't reach out again.

Step 5: Track What Works & Improve Fast

To know if your WhatsApp outreach is working, you need to go beyond “sent” and start tracking what actually moves the needle.

By keeping an eye on a few key metrics, you’ll know what’s working, where to improve, and how to scale without risking deliverability.

→ Key metrics to follow & how to react

Metric	Goal	Tracking Formula	Action if Off-Target
Reply Rate	**30% – 50%+ replies**	(Number of Replies ÷ Messages Sent) × 100	Revise message content or adjust targeting
Meeting Conversion	**15% – 25% of replies**	(Meetings Booked ÷ Number of Replies) × 100	Improve follow-up timing and lead qualification
Spam / Block Rate	**< 1%**	(Blocked/Reported ÷ Messages Sent) × 100	Warm up account, reduce send volume, or tweak message tone/copy
Time to First Reply	**< 5 minutes**	(Sum of all time-to-reply values ÷ Number of Replies)	Adjust tone or timing; nurture earlier in the sequence

Quick Recap

- [ ] **Set up your account the right way**

Use a real name, photo, and description. Warm up your account with real conversations before sending outreach.

- [ ] **Add WhatsApp where it makes sense**

Use it after emails, LinkedIn, or calls—not as a first touch. It’s best for warm follow-ups.

- [ ] **Craft messages that feel human**

Short, clear, and personal. Think reminders and check-ins, not pitches.

- [ ] **Stay safe and avoid getting flagged**

Pace your sends, avoid copy-paste, and stick to 1–2 steps per campaign.

- [ ] **Track results and optimize**

Measure reply rate, meeting conversion, and block rate. Tweak your approach based on what works.

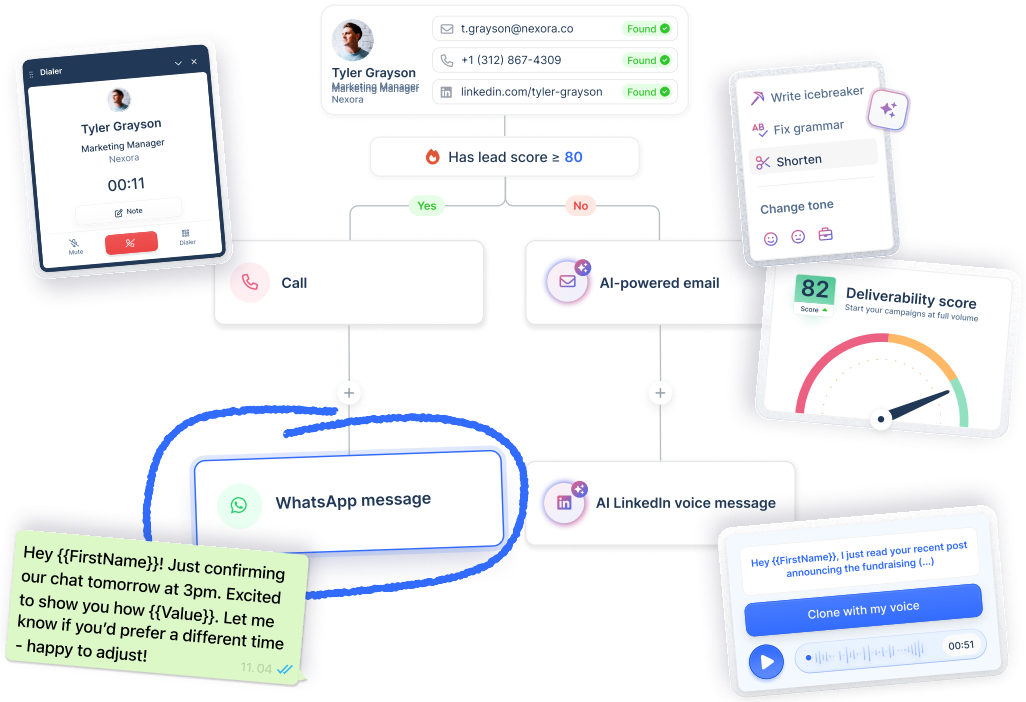
- [ ] **Bonus: Automate WhatsApp outreach with lemlist**

Set WhatsApp steps to send automatically, just like email, LinkedIn, and calls - inside your multichannel campaigns. Here’s how 👉

Bonus tip 🎁: Scale Your WhatsApp Prospection with lemlist

You've just learned how to use WhatsApp in outbound to build your pipeline. Now imagine running it in background, without the manual work.

lemlist is your multichannel sales platform, built to help you close leads across email, LinkedIn, calls, and now - WhatsApp. Everything in 1 spot, fully automated, and trackable.



- **Get leads' reliable phone numbers from top data providers in 1 spot**
- **Combine WhatsApp with email, LinkedIn & calls into a single automated flow**
- **Personalize content of every message on autopilot with smart variables**
- **Scale sending volumes safely with an automated warm-up pacing**
- **Track replies and manage conversations across channels from 1 chat**

Automate WhatsApp outreach →

Available as paid add-on on Multichannel Pro+ plans.