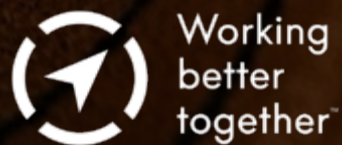




# How to engage supporters with WhatsApp



**CYMBA**

In partnership with



# Presenters

CYMBA



Rich Mullens

CYMBA  
Product Director



Steve Mathieson

CYMBA  
Head of Client Services



Tim Cummins

CM  
Technical Consultant



Spike Bowen

CM  
Head of Account Management



With over 40 years' combined experience in conversational messaging, Cymba has partnered with CM.com to create a unique **Rich Messaging solution** for charities.



CYMBA

ClearCourse  
SOFTWARE & PAYMENTS

# Agenda

- + About **Cymba & ClearCourse**
- + **Rich Messaging** Overview
- + Live **WhatsApp** Demo
- + Understanding the **WhatsApp Business Platform**
- + Leveraging **Generative AI** with **WhatsApp**
- + Q&A





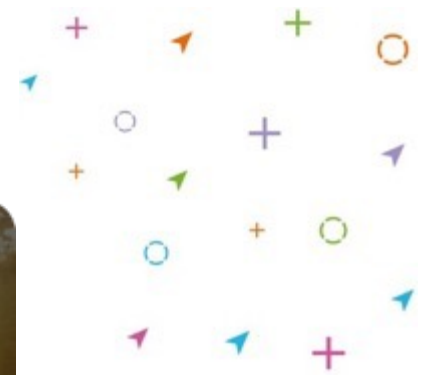
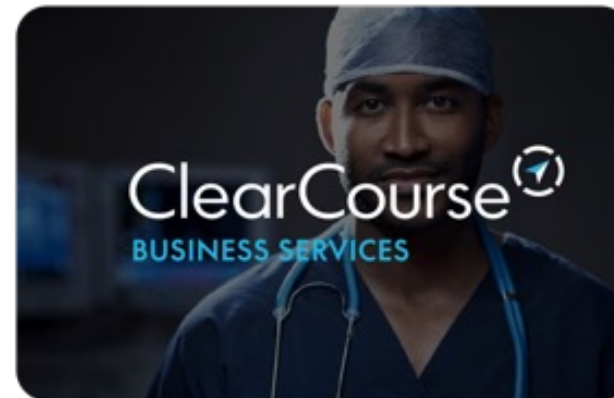
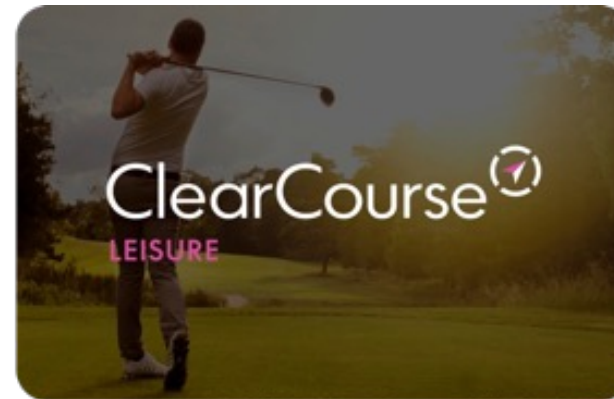
# ClearCourse – overview

Founded in 2018 with investment from **Aquiline, New York**

**ClearCourse** helps over 20,000 customers build great businesses with our industry-specific **software and embedded payments** platform

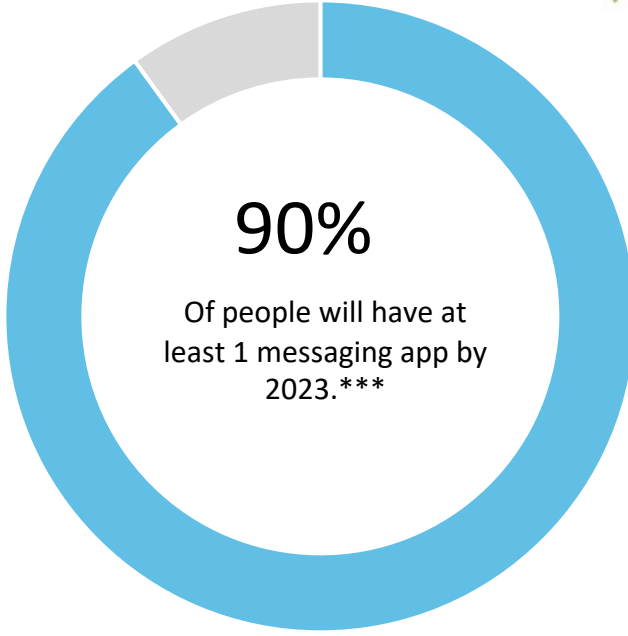
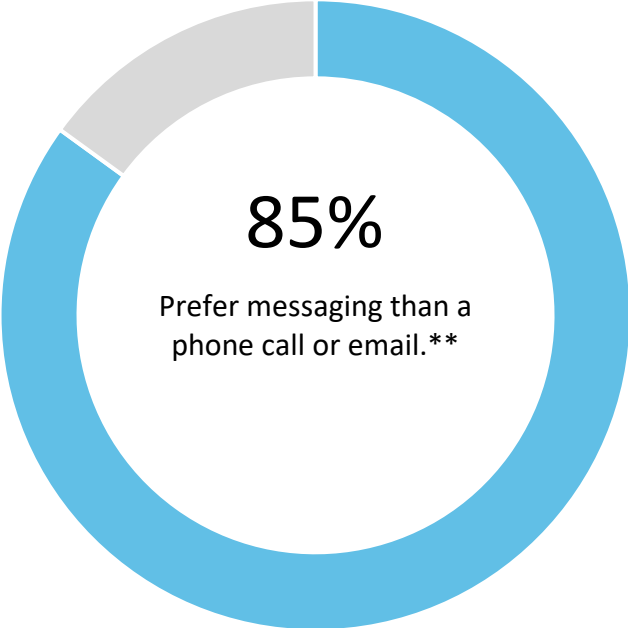
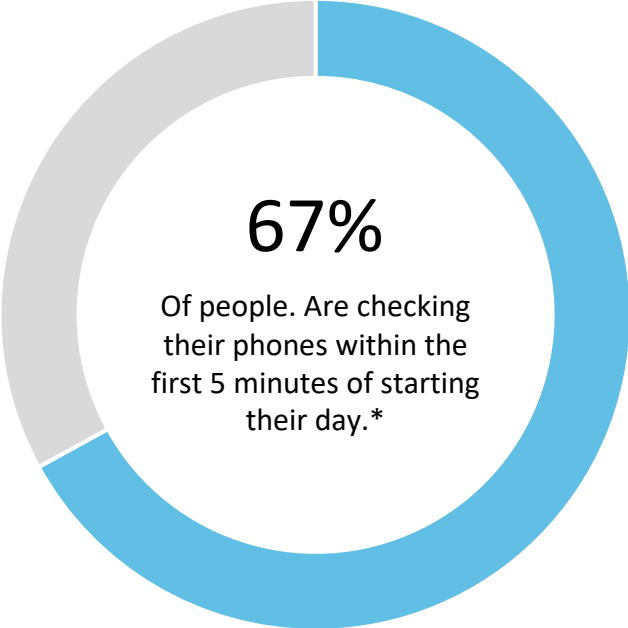
**CYMBA** is one of 30 brands serving businesses, charities, and notable brands across various sectors

We process over £1 billion in Card, Direct Debit and PSMS **payments** annually and send over 35 million **messages**





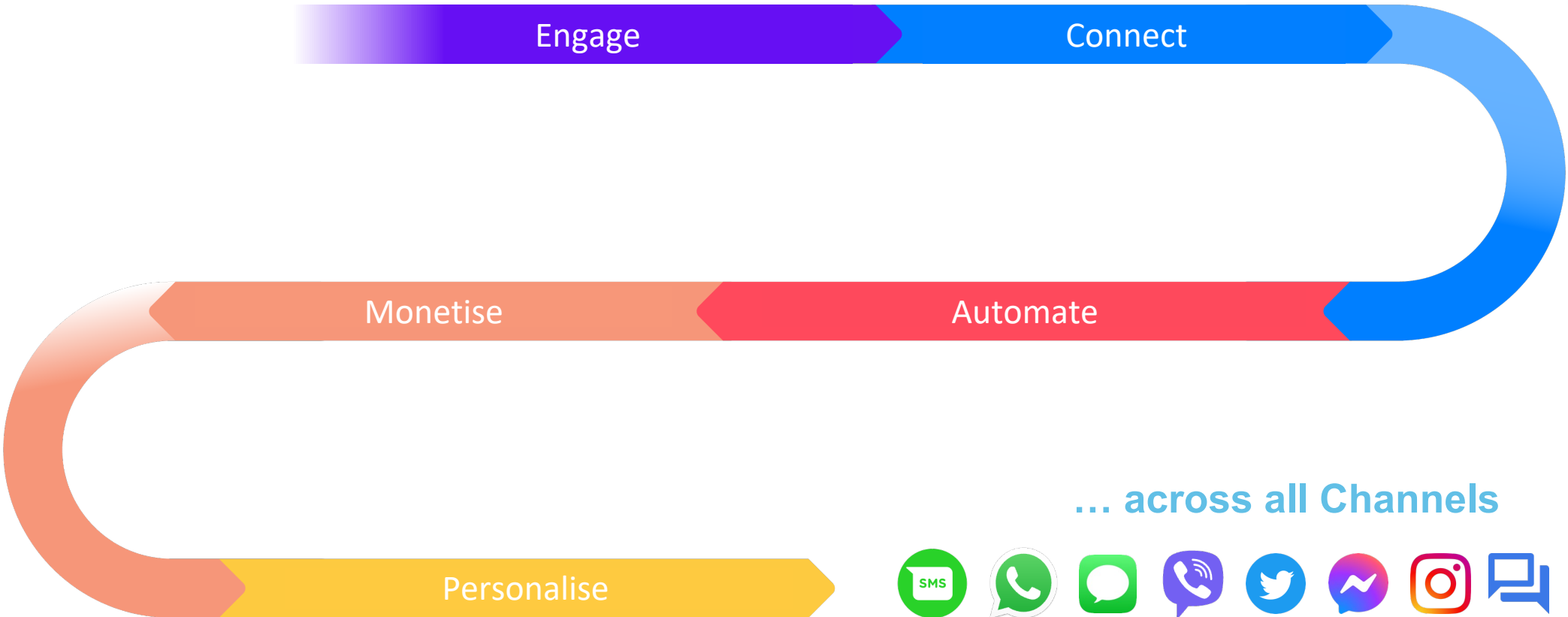
# Supporters prefer to chat with charities, not to talk...



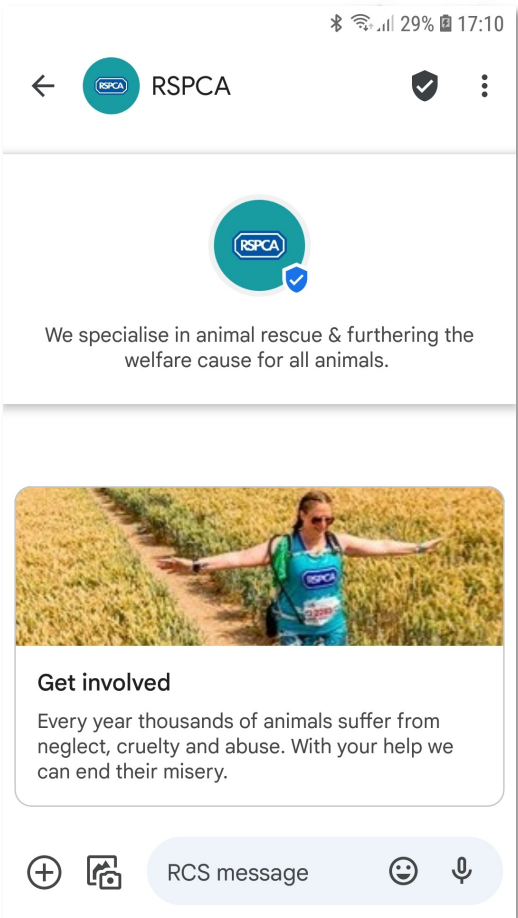
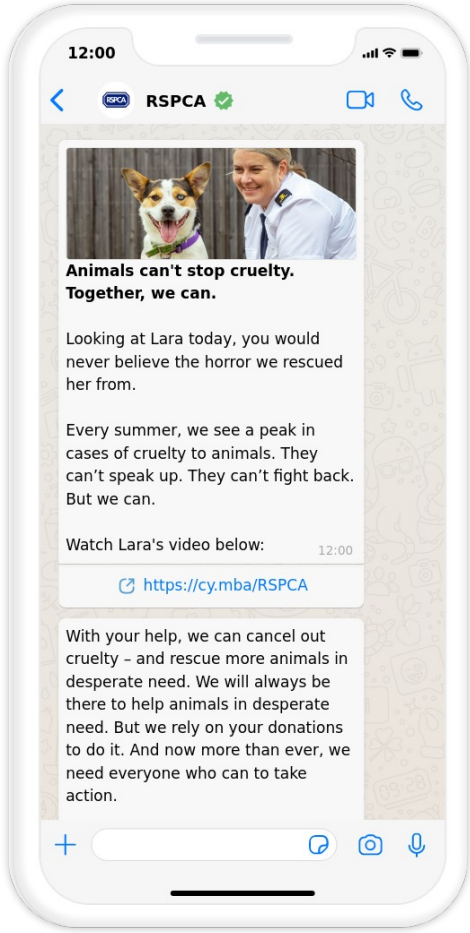
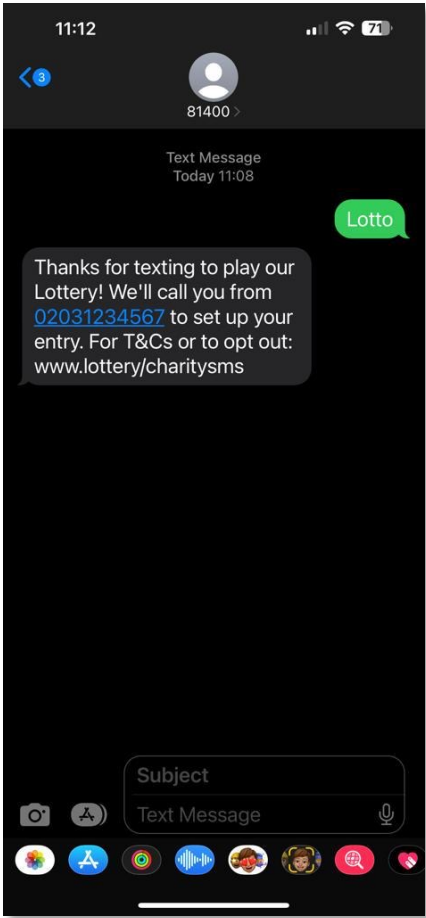
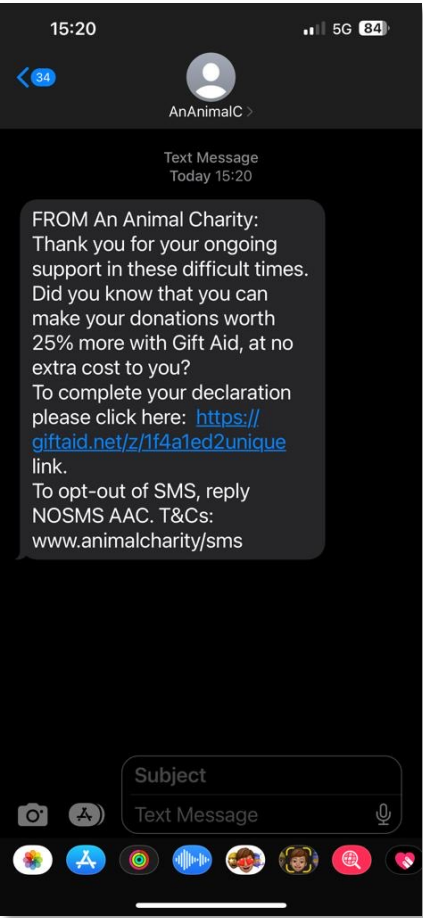
Source: \*Zipwhip- The State of Texting; \*\*Gartner, \*\*\*eMarketer



# Optimise your supporter journeys...



# Present and future...





# WhatsApp Business Platform

50 million organisations

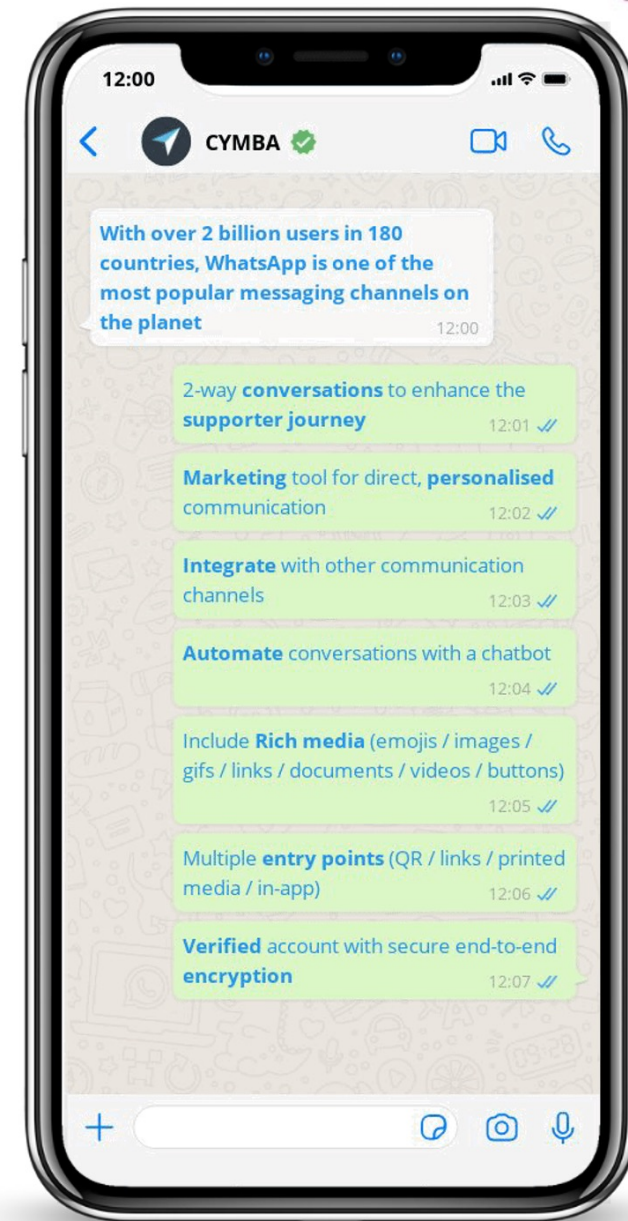
Open rates of 70% & clickthrough rates of 15%

39% of users prefer WhatsApp as a customer service channel

54% of users prefer marketing & updates on WhatsApp

Highest conversion rate of 45-60%, compared to 2-5% for emails and SMS

2.5 billion hours saved through WhatsApp **Chatbot** in 2023



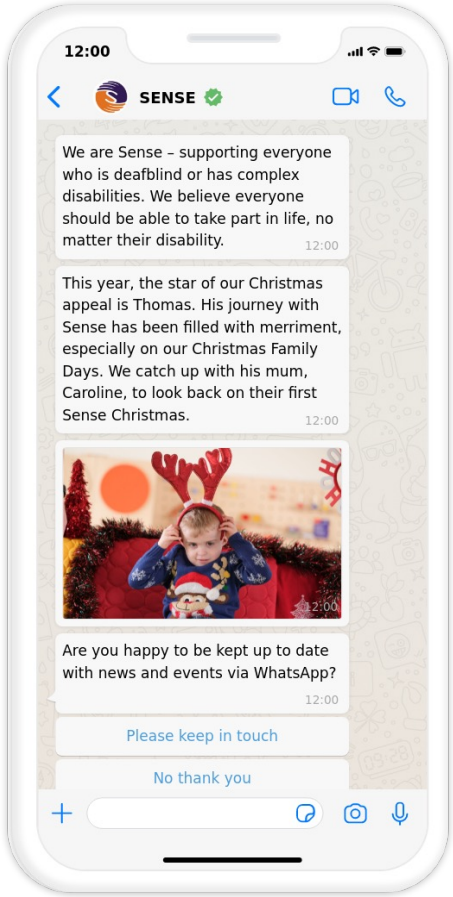
<https://www.cooby.co/post/whatsapp-statistics>



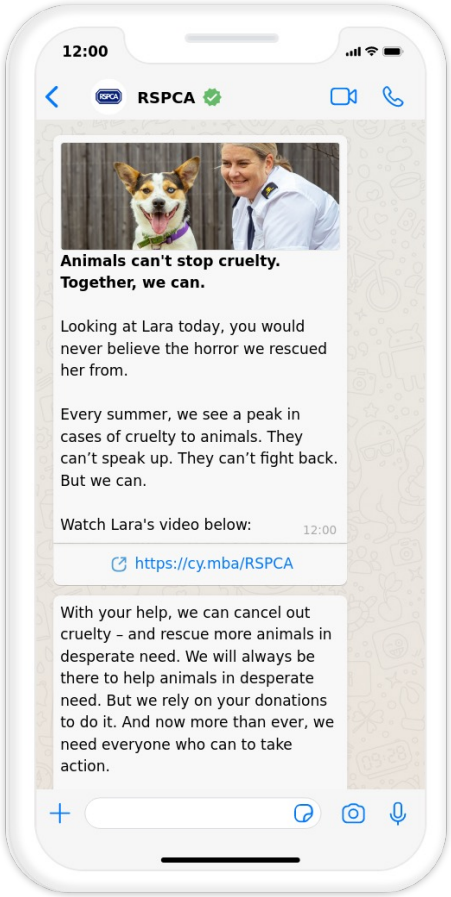


# Charity use cases

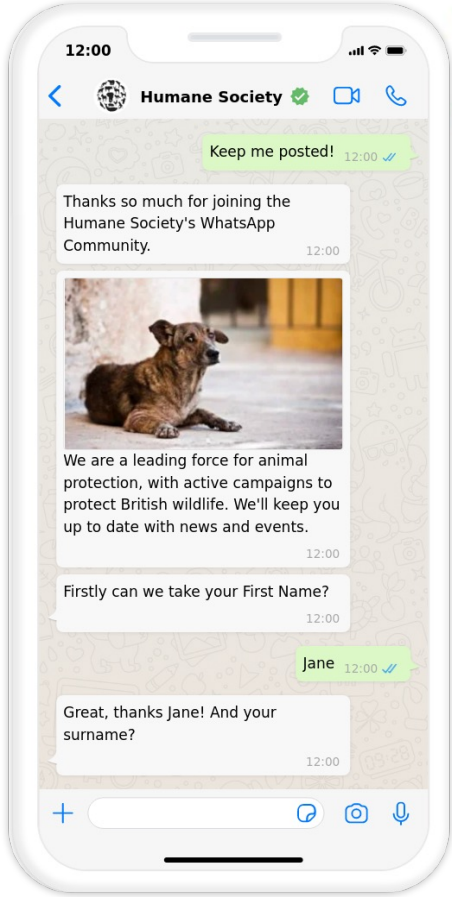
Use WhatsApp to send broadcast messages, rich content and capture supporter data in a more conversational and automated way.



Consent collection



Supporter content



Supporter data capture

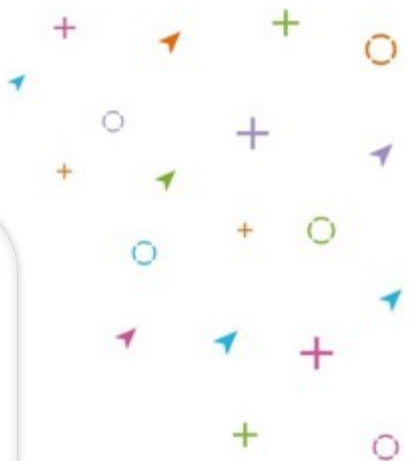
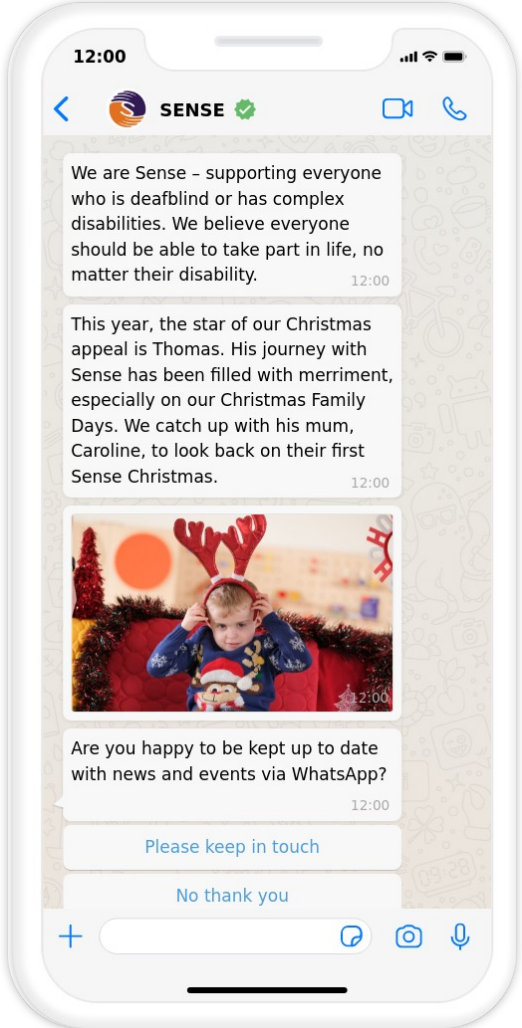


# WhatsApp Live Demo



Steve Mathieson

CYMBA  
Head of Client Services



# Charity WhatsApp campaigns



- + Fundraising: **Appeals**
- + Updates: **News & stories**
- + Events: **Registration, Location, Updates**
- + Engagement: **Supporter & volunteer journeys**
- + Supporter Service: **Donation confirmations & queries**

# Understanding the WhatsApp Business Platform



Spike Bowen

CM  
Head of Account Management

- + Improve your supporter experience
- + Understand conversation categories
- + How to choose conversation types





# Improve the Supporter Experience with WhatsApp



## Connect With Supporters

Offer world-class Supporter service and minimise friction in the supporter journey on their favourite messaging app



## Initiate More Conversations

Reply to incoming messages with message templates and provide opted-in supporters with the info they need



## Powerful Features

Take advantage of features such as quick replies, appeals and updates for effective communication with supporters



# Choose the conversation category to fit the message



## Marketing/Fundraising

Marketing conversations relate to products/services, including donations and appeals or any conversation that doesn't qualify as authentication or utility.

## Utility

Utility conversations are directly related to a transaction, including post-purchase notifications and recurring billing statements.

## Authentication

Authentication conversations provide users one-time passcodes for authentication purposes. These can occur at any stage of the user journey — such as registration, account recovery, or integrity challenges.

## Service

Service conversations are initiated by users; these are typically about resolving enquiries. Organisations can respond within the 24-hour customer service window.



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# Choose How Your Traffic is Counted



## Monthly Active Users

For continuous engagement within a month with supporters / event participants / volunteers. This bundle counts unique users with whom messages were exchanged within a month.



## Conversations

For one-time chats with a clear start and end. This bundle counts all 24-hour windows messaging sessions to a unique user.



## Messages

For sending out single messages with limited responses. This bundle counts all outbound (MT) and inbound (MO) messages.



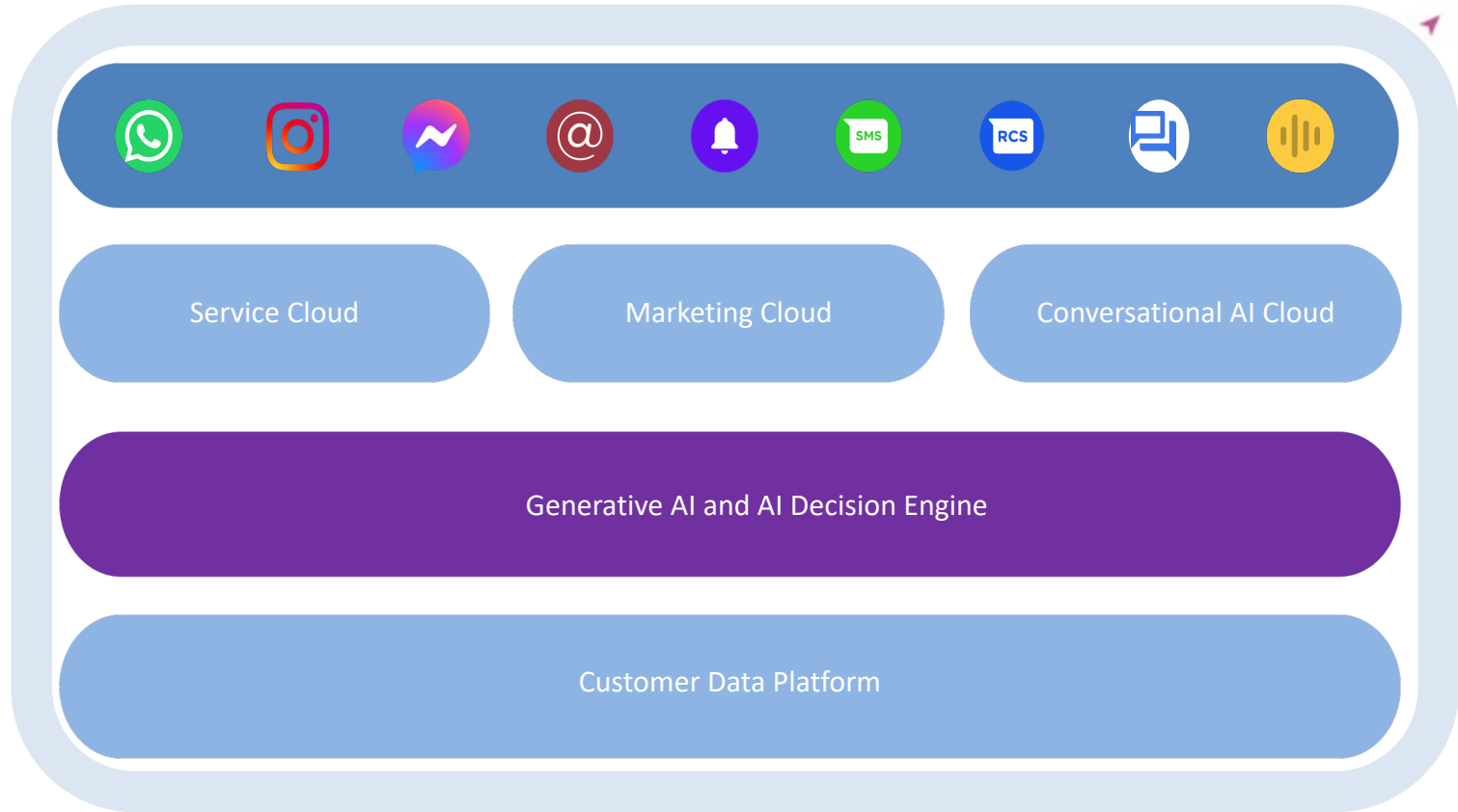


# Leveraging Generative AI with WhatsApp



Tim Cummins

CM  
Technical Consultant



Channels

Applications

Intelligence

Data

End-to-end

AI Driven

Low-/No-code

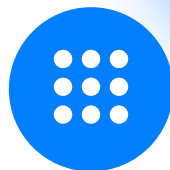


# Expectations of supporter service:

Low effort & high gratification



Fast (if not instant) first and follow-up responses



Availability on the preferred channels



Frictionless self-service experiences



Instant gratification and issue resolution

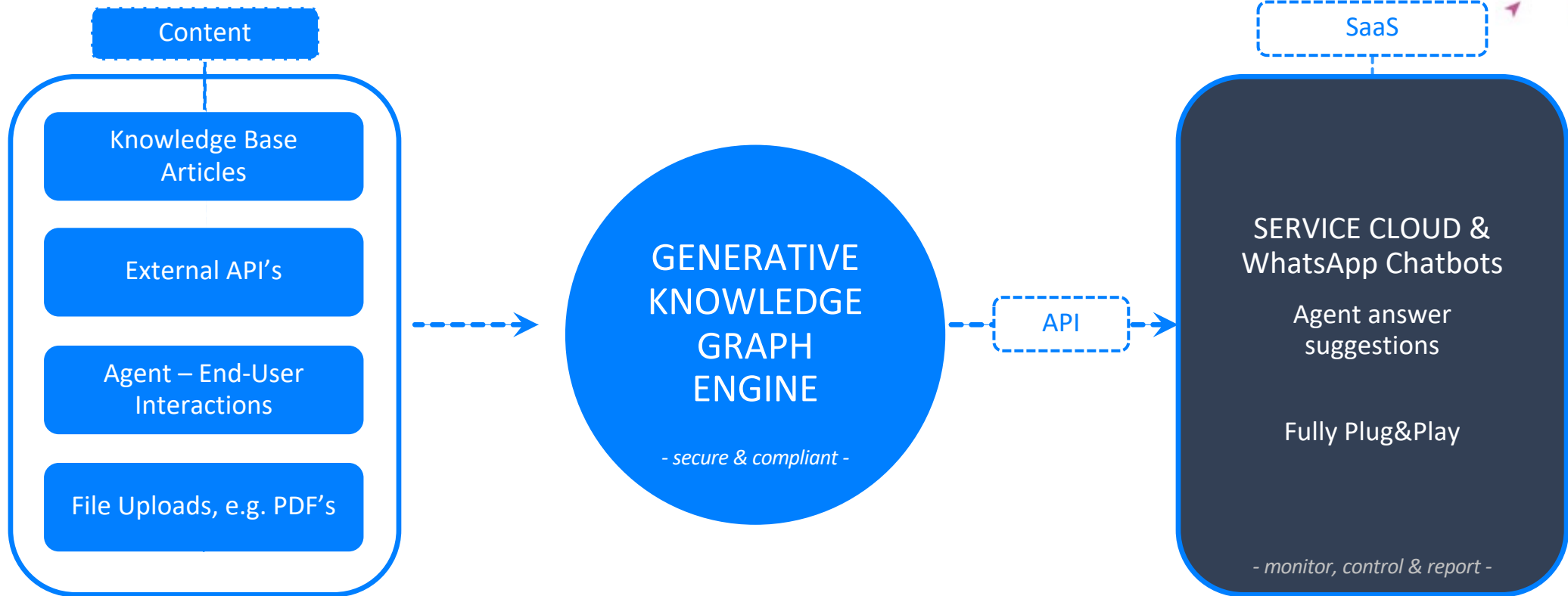


Friendly, knowledgeable agents

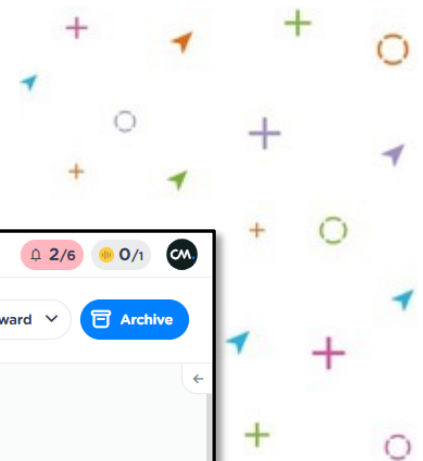


Personalized, contextual service experiences

# Our Generative AI engine



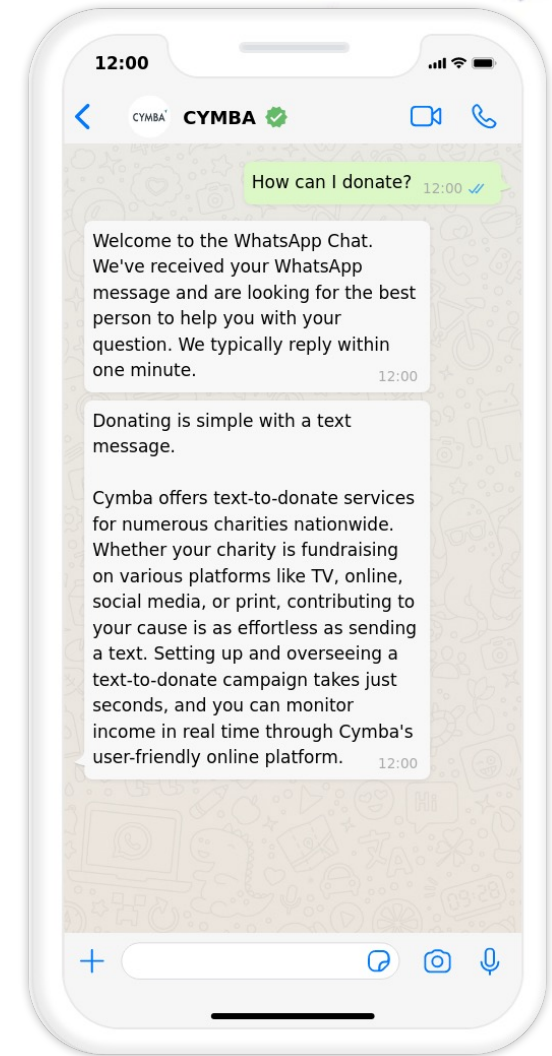
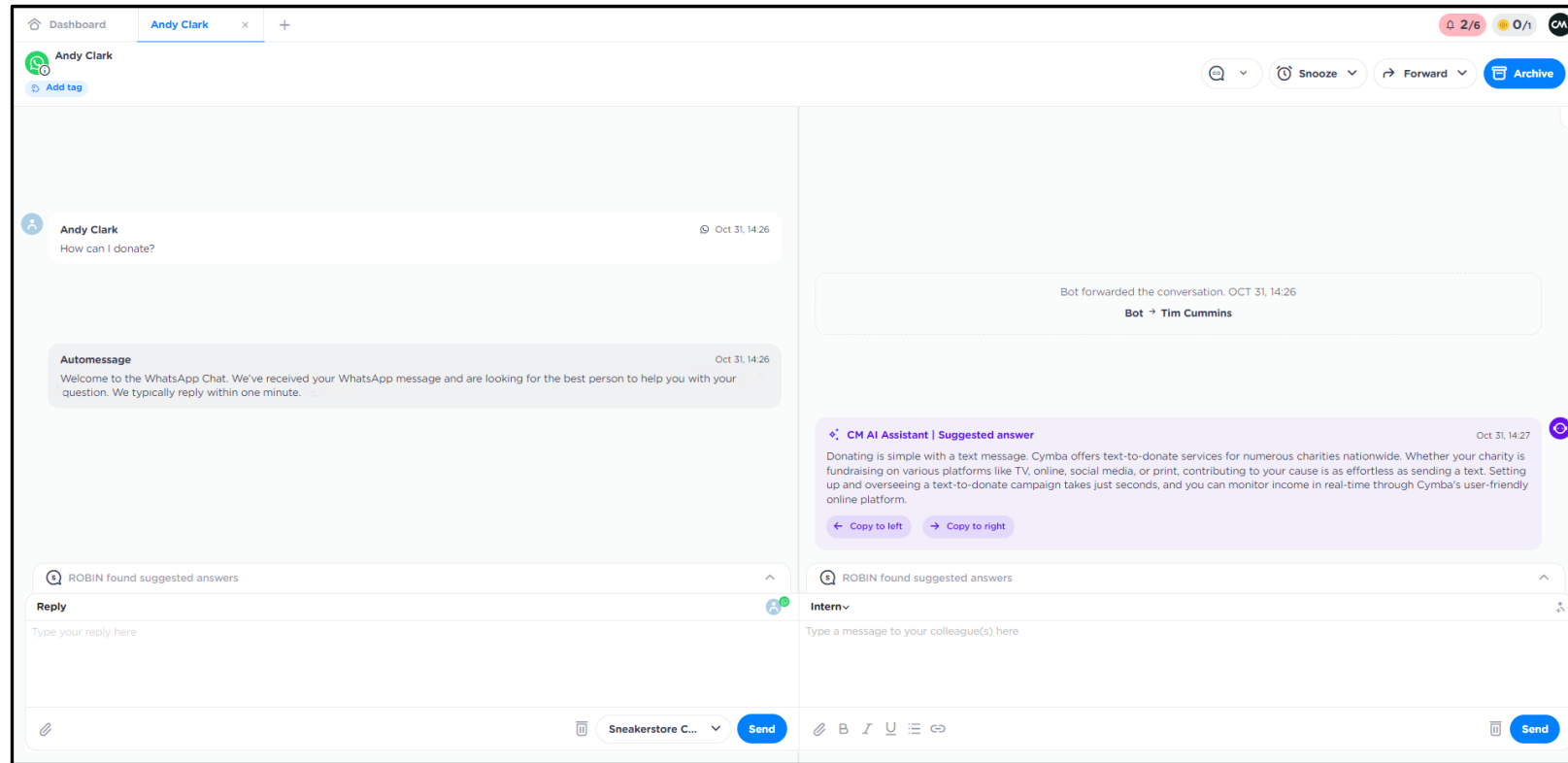
# Service Cloud AI-powered WhatsApp assistant



The screenshot displays a WhatsApp chat window for 'Andy Clark'. The chat history includes a customer message asking 'How can I donate?' and an automated welcome message. A bot has forwarded the conversation to 'Tim Cummins'. The 'CM AI Assistant' provides a suggested answer about donating via Cymba, with 'Copy to left' and 'Copy to right' buttons. The interface also shows a search bar with 'ROBIN found suggested answers' and a 'Send' button.



# Service Cloud AI-powered WhatsApp assistant



# Q&A

**Request Slides /  
Book a demo**

