

WhatsApp opt-in: checklist

12 touchpoints, the legal must-haves and the 90-day plan on two pages. Print it, tick it off, work through it.

Legal must-haves

- ☐ Consent is given actively. No pre-ticked box.
- ☐ Timestamp, channel and exact consent wording are documented.
- ☐ The user knows who sends, what they will receive and how often.
- ☐ Every newsletter carries an opt-out note, for example "Reply STOP".
- ☐ Opt-out takes effect immediately.
- ☐ Double opt-in via confirmation message is set up (recommended, not mandatory).

The 7 strategies

- ☐ Newsletter widget placed on the website
- ☐ QR code in use at the point of sale
- ☐ Click-to-WhatsApp linked on social media
- ☐ Existing email list invited to switch
- ☐ Opt-in added to the checkout flow
- ☐ Exclusive incentive defined (discount, early access, VIP content)
- ☐ Events and trade shows prepared with a QR code

5 touchpoints most small businesses miss

- ☐ Subscribe buttons added to website, blog and landing pages
- ☐ Email signature extended for the whole team
- ☐ Custom trigger words set per product or display
- ☐ Guest WiFi login page used. Access not tied to the opt-in.
- ☐ Google Business Profile completed with WhatsApp in the "Chat" field

QR placements that work in daily business

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|---|--|
| ☐ Receipt | ☐ Invoice and delivery note |
| ☐ Business card | ☐ Window poster |
| ☐ Insert in the shipping box | ☐ Company vehicle |
| ☐ Table tent | ☐ Trade show booth |

90-day plan

Period	Tasks	Subscribers
Week 1 to 2	Widget, QR code, welcome message, email signature, Google profile	30 to 50
Week 3 to 4	Set social media links, invite the email list	80 to 120
Month 2	Checkout opt-in, first campaign, social media on a rhythm	200 to 300
Month 3	Review content, test incentives, use an event	400 to 550

5 mistakes that cost you subscribers

- ☐ Pre-ticked checkboxes
- ☐ No confirmation message after sign-up
- ☐ Unclear benefit. "Subscribe to our newsletter" says nothing.
- ☐ Opt-in that is too aggressive. Pop-up on page load.
- ☐ No value after sign-up

Notes