WHATSAPP

# WhatsApp as the hospital front door

WhatsApp already does front-desk work on staff phones. The Business API runs it properly: shared inbox, CRM, templates.

Swipe →

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APP VS API



# Why a hospital needs the API

| | |
|---|---|
| WHO | One person on a phone vs teams, contact centres, multi-unit groups |
| INBOX | On the device vs shared inside a CRM or support tool |
| OUTBOUND | Manual vs approved templates, sent by trigger |
| RECORDS | Stay on the phone vs logged against the patient record |
| COST | Free vs Meta template fees plus the software provider |

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THE PROBLEM



# WhatsApp on staff phones costs you later

- Patient data sits on personal devices
- When a coordinator leaves, conversations and numbers leave too
- No record to review when a complaint arrives
- Under DPDP, a report sent from a personal phone is hard to defend
- Enquiries never reach the CRM, so the unit looks weak on dashboards

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FIVE RULES



# The rules that matter

1. Opt-in: record when and how each patient agreed to messages
2. Templates: outside an active chat, only pre-approved templates
3. Service window: reply freely for a limited time after they write
4. DPDP: purpose-specific consent, easy withdrawal, protect health details
5. Clinical boundary: bots route and inform, never diagnose

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TEMPLATES FIRST



# Utility templates most hospitals need

| | |
|---|---|
| ACKNOWLEDGE | Immediately after a message outside staffed hours, with timings |
| CONFIRM | On booking, with date, time, doctor and location |
| REMIND | The day before and a few hours before the visit |
| REPORTS | When a report is ready through a secure link |
| MARKETING | Health camps and packages only to patients who opted in |

Keep every template short, factual and free of claims.

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THE MENU



# Five buttons, then a person

- Book or change an appointment
- Get my reports
- Bills, estimates and insurance
- Directions and timings
- Talk to someone

No dozen-option text menus. Bills and insurance nearly always need a person; route them fast.

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SETUP



# One group number, routed by unit

- **Pick a Meta solution provider or a CRM with native WhatsApp**
  Verify the business and register the number
- **One group number with routing beats one per unit**
  Patients keep one thread; units keep their own queue
- **Tag every entry point: website, doctor page, listing, QR, ads**
  The chat opens already knowing where the patient came from
- **Train agents first, automate routine non-clinical questions later**
  A chatbot before a reliable human inbox fails

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WRITTEN RULES



# Approved by the medical director and legal

- Urgent messages: instant emergency number, flagged to a supervisor
- Clinical questions: book, arrange a call-back or direct to emergency
- Reports: verify identity, secure link with one-time code, log every release
- Marketing: only to opted-in patients, sensible frequency, easy opt-out

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READ THE FULL GUIDE



# WhatsApp Business API for hospitals, in full

- Staffing the inbox like a contact-centre queue
- Designing the handoff to a person
- A rollout order for multi-unit groups
- gauravphogat.com/whatsapp-business-api-for-hospitals

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