

S10U AI Studio Sales Enablement Training Pack

Everything a seller needs to qualify, scope, demo and close an AI Studio deal on the WhatsApp Business Platform — from discovery through to a signed SOW.

Document	S10U AI Studio Sales Enablement Training Pack
Version	v1.1 — Final
Date	13 August 2026
Status	Approved for internal and partner release
Owner	Hannes Esterhuizen — Sales & Solutions, Sideways10UP (Pty) Ltd
Audience	S10U direct sales, Everlytic account teams, accredited resellers
Platform of record	app.s10u.ai (agency dashboard) · api.s10u.ai (AI Studio Resource Centre)
Commercial source	Everlytic AI Studio Rate Card (RSA) — the only authorised source of pricing
Classification	Internal / Partner — not for client distribution without amendment

READ THIS BEFORE YOU USE THE PACK

This pack was assembled from the AI Studio Resource Centre (api.s10u.ai, retrieved 12 August 2026), the Everlytic AI Studio Rate Card, and live client engagement material. It is the approved production release.

This pack deliberately carries no rand figures. All pricing lives in one place — the Everlytic AI Studio Rate Card — and sellers quote from that document, never from training material. Every capability claim listed in the Appendix C open items register must be verified before it is stated to a client or issued to a reseller.

This confidential document is intended purely and solely for internal Everlytic use and not for sharing with external parties or clients.

Contents

	Module	Duration
Part A	Foundation	
1	How to use this pack	20 min
2	The company, the product and the delivery chain	25 min
3	The market case: why WhatsApp, why now	20 min
Part B	The Product	
4	Platform architecture and module map	25 min
5	Bot building and the chat-flow builder	35 min
6	The AI layer: training and behaviour	35 min
7	Inbox and live agent operations	25 min
8	Campaigns: broadcasts and drips	20 min
9	Integrations and extensibility	30 min
10	Team, roles and governance	15 min
Part C	Meta Platform Fundamentals	
11	Onboarding, verification and trust markers	25 min
12	Message categories, windows, templates and limits	40 min
13	Meta billing: who pays whom	20 min
Part D	Commercials	
14	The commercial model and the rate card	30 min
15	Building a quote that survives review	35 min
16	The reseller programme	20 min
Part E	Selling	
17	Ideal customer profile and qualification	30 min
18	Discovery question bank	30 min
19	Verticals and use cases	30 min
20	The demo	30 min
21	Objection handling	40 min
22	Competitive positioning	30 min
23	Compliance: what sellers must get right	35 min
24	From verbal to signed: the SOW pipeline	25 min
Part F	Assessment & Reference	

	Module	Duration
25	Knowledge check (34 questions)	45 min
26	Role-play scenarios	45 min
A	Glossary	
B	Source index	
D	One-page battlecard	

PART A

Foundation

Modules 1 – 3. How to use the pack, who we are, and why a buyer should care in 2026.

MODULE 1 • 20 minutes

How to use this pack

This pack is built to be delivered as four facilitated sessions, or worked through solo as self-study. It is deliberately heavier on Meta platform mechanics and commercial modelling than a typical product deck, because those two areas are where AI Studio deals are won, lost, and — most expensively — mis-scoped.

1.1 Session structure

Session	Modules	Duration	Outcome
1 — Foundation & product	1 – 10	3 hours	Can describe what AI Studio is, what it does, and where it sits in the delivery chain without reaching for a deck.
2 — The channel	11 – 13	2.5 hours	Can explain conversation categories, the 24-hour window, messaging limits, quality rating and how Meta billing is set up, without notes.
3 — Commercials & quoting	14 – 16	2 hours	Can assemble a complete, correctly structured quote off the current rate card without omitting a line.
4 — Selling & closing	17 – 24	3 hours	Can run discovery, demo, handle the standard objections, position against Meta Business Agent, and hand a clean brief to SOW production.

1.2 Accreditation

A seller is considered AI Studio accredited once they have:

1. Completed all four sessions.
2. Scored 80% or better on the Module 25 knowledge check (34 questions, closed-book).
3. Delivered one live demo to an internal panel using the Module 20 structure.
4. Produced one practice quote off the current Everlytic rate card that survives commercial review without line-item or figure corrections.
5. Completed one role-play from Module 26 covering price and competitive objections.

STANDING RULE

Until a seller is accredited, no capability commitment and no go-live date goes to a client in writing without sign-off. Pricing is only ever quoted from the current Everlytic AI Studio Rate Card, never from memory, never from a previous client quote, and never from this pack.

1.3 Conventions used

- **Verified capability** — documented in the AI Studio Resource Centre or observed in the live platform. Safe to state to a client.
- **Flagged capability** — plausible, discussed internally, but not confirmed in documentation or in the build. Say “I’ll confirm and come back to you.” Listed in Appendix C.
- **Out of scope** — explicitly not part of the platform. Selling it creates a delivery problem, not a deal.

MODULE 2 · 25 minutes

The company, the product and the delivery chain

Sellers lose credibility fast when they cannot answer “so who actually am I contracting with, and who runs the platform?” This module gives you the clean version.

2.1 Who is who

Party	Role in an AI Studio engagement
Meta	Owns the WhatsApp Business Platform. Approves message templates, sets messaging limits and quality ratings, and bills the client directly for template messaging against the client’s own payment method. Meta is the regulator of the channel, not a supplier you negotiate with.
Sideways10UP (Pty) Ltd (S10U)	South African Meta-certified WhatsApp Business Platform provider and the builder of AI Studio. Holds its own Meta developer app and connects directly to the WhatsApp Business API. VAT No. 4820274118, Kempton Park, Gauteng.
Everlytic	Commercial and delivery front for a large part of the client base. S10U operates as a subcontractor within the Everlytic delivery structure, and most client-facing SOWs are issued as Everlytic / S10U documents.
The client	Owns their Meta Business Account, their WhatsApp Business number, their customer data and their consent base. Under POPIA they are the responsible party. S10U / Everlytic act as operator.

SAY IT LIKE THIS

“Sideways10UP builds and runs the platform and holds the Meta certification. Everlytic is the commercial and delivery layer you contract through. Meta bills you directly for your template messaging, on your own card — exactly the way it already does for your Facebook and Instagram advertising.”

2.2 What AI Studio actually is

AI Studio is a multi-channel conversational platform, sold primarily for WhatsApp, with an AI layer, a live-agent inbox and campaign tooling in one product. The Resource Centre describes it as a SaaS chatbot builder that automates business communication; commercially, it is better positioned as three products in one licence:

Layer	What it does	Who in the client cares
Automation layer	Visual chat-flow builder, AI knowledge base trained on the client’s own content, external API calls inside a flow, dynamic data capture via custom attributes.	Operations, digital, IT

Layer	What it does	Who in the client cares
Human layer	Omnichannel inbox with live agent handoff, assignment, transfer, tags, chat status, notes, quick replies, transcripts and bulk operations.	Customer service, sales management
Growth layer	Broadcast and drip campaigns across WhatsApp, Facebook and Telegram, contact groups and segments, Meta Catalogue and order capture.	Marketing, CRM, e-commerce

Underneath all three sits a sub-tenant / multi-tenant architecture. One agency or OEM parent can hold many isolated sub-accounts — this is the structural reason AI Studio wins dealer networks, franchise groups and reseller-led deals that a single-tenant tool cannot serve.

2.3 Channels supported

Channel	Status	Notes for sellers
WhatsApp (Cloud API)	Primary	Full feature set: AI, flows, API component, broadcasts, drips, orders, live agent. This is the deal.
Website / live chat / landing page	Supported	Separately subscribed from WhatsApp — the two are distinct products with distinct commercial treatment. Useful as an add-on, never as a discount lever.
Facebook Messenger	Supported	Bot settings, AI settings, broadcasts and drips available.
Telegram	Supported	Rarely material in SA deals; keep it in the back pocket for tech and crypto-adjacent clients.
SMS / email	Via Everlytic	Do not position as AI Studio functionality. Position as “Everlytic already does this and it sits alongside.”

COMMON OWN-GOAL

The API chat component — the one that lets a flow call an external system live — is currently WhatsApp-only. Do not promise live CRM lookups inside a website or Telegram flow.

MODULE 3 · 20 minutes

The market case: why WhatsApp, why now

You are not selling a chatbot. You are selling the only channel in South Africa where a business can reach effectively its entire customer base in a medium those customers already read. Sellers who lead with technology lose to sellers who lead with reach and cost-to-serve.

3.1 The three arguments that move buyers

Argument	The case	Where it lands
Reach and read rates	WhatsApp is the default messaging layer for South African consumers across income bands, languages and device types. Email open rates and SMS response rates are not comparable. There is no app to install and no data cost objection.	Marketing, CX
Cost to serve	An AI-handled enquiry costs a fraction of a call-centre-handled one, and it deflects volume rather than queueing it. The AI layer answers routine questions and escalates only what needs a human.	COO, CFO, contact centre
Speed of response	Lead response time is the single biggest determinant of conversion in most SA sales operations. WhatsApp plus routing gets a qualified lead to the right agent in seconds instead of hours.	Sales leadership

3.2 Why now

There are three reasons a buyer should act this year rather than next, and none of them requires manufactured urgency:

- Their customers are already on WhatsApp and already messaging them there — usually to a handset nobody is accountable for. The channel exists whether or not it is managed.
- Messaging limits and quality ratings build over time. A business that establishes its number and its sending reputation this year is able to run at scale next year; one that starts in a rush cannot.
- Competitors in every SA vertical are moving onto the channel. First-mover advantage on WhatsApp is real, because the customer only keeps one thread per brand and the brand that gets there first owns it.

POSITIONING LINE WORTH MEMORISING

"Your customers are already messaging you on WhatsApp. The only question is whether that happens on a phone in the corner or in a system where you can route it, measure it, and follow up on it."

PART B

The Product

Modules 4 – 10. What the platform does, module by module, at the level of detail a seller needs to answer questions in the room instead of taking them away.

MODULE 4 · 25 minutes

Platform architecture and module map

AI Studio is organised into seven top-level modules. Learn these names — they are what the client will see on the left-hand navigation in the demo, and mapping a client requirement to a module in real time is the fastest credibility win available to you.

Module	What lives there	Typical discovery trigger
Bots	Create and manage bots per channel; chat-flow builder; AI training; bot settings; broadcast and drip campaigns; installation code; integrations.	"Can it answer questions about our products?"
Inbox	Chats, Orders, Contacts and Groups. The live agent workspace and the campaign audience builder.	"Where do my agents work?"
Team	Users and Roles. Module-level permissions (view / edit / none) assembled into named roles.	"Can I stop agents seeing each other's conversations?"
Subscriptions	Plan, billing and invoices.	"How do we get billed?"
My Account	Profile, custom attributes, tags, chat status configuration.	"Can we tag by dealership / branch / product?"
Notifications	Notification centre and notification settings.	"How will my team know a chat is waiting?"
More → Developers	API configuration for the external-API chat component; API access keys.	"Can it look up a policy number in our system?"

4.1 The tenancy model

Two structures matter commercially, and confusing them is the most common scoping error in the pipeline:

Model	Structure	Sell it when
Single tenant	One account, one or more bots, one shared inbox, one team with roles.	Single-brand business, one customer base, one service team. Most SME and mid-market deals.
Sub-tenant / multi-tenant	A parent account holding many isolated sub-accounts, each with its own bot, inbox, agents and data separation.	OEM with a dealer network, franchise group, group of subsidiary brands, or a reseller/agency reselling to its own clients.

SCOPING DISCIPLINE

Every sub-tenant is a discrete environment: its own setup fee, its own platform rental, its own agent seats. A “38-dealership rollout” is not one deal with a volume discount — it is 38 environments, and the quote must show that before any economy-of-scale discount is discussed. This is exactly how the BYD dealer-network scoping was structured.

4.2 Where the client's data sits

- Conversation content, contacts, custom attributes, tags and transcripts sit in AI Studio.
- Message delivery, template approval, phone number status and quality rating sit with Meta.
- The client's system of record — CRM, ERP, policy admin, DMS — stays where it is. AI Studio reads from and writes to it via the API component or a native connector. AI Studio is not a CRM and should never be sold as a CRM replacement.

MODULE 5 · 35 minutes

Bot building and the chat-flow builder

This is the module you will demo most often. You do not need to build flows for a living, but you must be able to open the builder, add a component, connect it, and explain what happens when a customer hits it.

5.1 Creating a bot

Bots are created per channel. For WhatsApp there are two onboarding routes:

Route	How it works	When to use
Automated onboarding	Embedded Meta signup flow from within AI Studio. Faster, fewer manual steps, fewer places to go wrong.	Default for almost every deal. Lead with this.
Manual onboarding	Client creates their own Meta app, registers and verifies the number, subscribes the S10U webhook, assigns a system user, attaches a payment method, and hands over credentials from the Meta developer dashboard.	Client insists on holding their own Meta app, or has an existing WABA with constraints. Adds days and support load — flag it in scoping.

Prerequisites the client must have — the pre-flight checklist

Run this in discovery, not in onboarding. Every item missing is a delay you will be blamed for.

- A phone number that is active, able to receive SMS, and not currently registered on WhatsApp or the WhatsApp Business app. A single number can only live on one WhatsApp service at a time — moving an existing number means deleting it from the consumer app first.
- A registered legal business entity.
- A live website with a valid, reachable privacy policy.
- A use case that complies with the WhatsApp Commerce Policy and Meta Commerce Policy.
- A payment method — credit or debit card — capable of international payments, loaded onto their own Meta Business Manager. Meta bills the client directly for template messaging, exactly as it does for Facebook and Instagram advertising.

DEAL-KILLER TO ASK ABOUT IN THE FIRST CALL

"Is the number you want to use currently on WhatsApp or WhatsApp Business?" If it is the number printed on their trucks and answered by a person on a handset today, you have a change-management conversation, not a technical one. Options: migrate the number and lose the handset, or provision a new number and redirect. Decide early.

5.2 The chat-flow builder

Open a bot and choose Edit your chat flow. The canvas gives you:

Tool	What it does
Add new component	Dropdown of every available component — questions, information capture, multiple choice, and so on.
Quick tool bar	Fit view, zoom in and out, delete, and lock to prevent accidental edits.
Mini map	Overview of flow position when the flow runs beyond the visible canvas.
Flow connector	Drag a line from one component to another to define the path.
Test Bot	Preview live behaviour before publishing. Use this in every demo.
Install Bot	Retrieve installation code (website bots).

Components you must be able to name

Component	Use case	Seller note
Multiple Choice	Present fixed options and branch on the answer.	The most reliable component in the set. Keeps conversations short and predictable, and gives you clean data instead of free text to interpret.
Smart Question	Branch on keywords the customer types freely.	Where free text meets structure. Good for “describe your issue”.
Live Chat	Hand the conversation to a human agent.	The handoff. Every serious client asks for this; know exactly where it sits.
API	Call an external REST API mid-flow and branch on the response code.	The integration story. WhatsApp only — see Module 9.
End chat	Terminate the flow cleanly.	Mandatory. A flow without an End chat on its final component throws errors. Mention it in demos as evidence you know the product.

DEMO DISCIPLINE

Use Advanced Options to set message timing so the bot does not fire four messages in one second. A bot that paces like a person demos vastly better than one that dumps its whole answer at once.

5.3 Website, live chat and landing page bots

One bot type covers three deployments: an embedded website widget, a live chat implementation, or a standalone landing page. Installation is a code snippet from Install Bot. Website bot settings are broader than WhatsApp’s and include Design, General, Alerts, Triggers, User Access and Chat Window — worth knowing because clients often expect WhatsApp bots to have the same visual configuration options and they do not.

MODULE 6 · 35 minutes

The AI layer: training and behaviour

This is the differentiator and the risk. Sellers over-promise here more than anywhere else in the product. Learn what the AI layer actually is: a knowledge base assembled from client-supplied sources, plus a configurable persona, wrapped around a generative model.

6.1 Training sources

Source	What it ingests	What to ask the client for
Website URLs	Crawls supplied pages and builds knowledge from the content.	A list of the URLs that are actually accurate. Most corporate sites have stale product pages — garbage in, confidently-worded garbage out.
File upload	Documents uploaded directly into the bot.	Product datasheets, price lists, T&Cs, policy documents, service manuals.
FAQs	Structured question-and-answer pairs.	The contact centre's existing FAQ or top-20 call reasons. This is the single highest-value input and the fastest to produce.
Conversation history	Prior conversations between the bot and real users.	Nothing at launch — this is a phase-two improvement mechanism. Sell it as continuous improvement, not day-one capability.
Other sources	Additional custom sources exposed by the platform.	Confirm the current list with the platform team before promising anything specific.

THE KNOWLEDGE-BASE CONVERSATION TO HAVE IN DISCOVERY

Ask: "Who owns the accurate version of your product and pricing information today, and what format is it in?" If the answer is "it is in people's heads" or "in a spreadsheet three people maintain", that is a professional services line item, not a platform feature. Price the content work.

6.2 AI settings — the persona controls

These are the levers you demo when a client says "it will not sound like us":

Setting	What it controls
Answer Length	Preferred length of bot responses. Shorter is almost always better on WhatsApp — long replies read badly on a phone.
Answer as	The persona the bot adopts when responding.
Tone	Tone of voice.
Language	Language of communication.
Answer Formatting	How responses are presented to the user.
Included Sources for Response	Whether the bot cites the source it drew the answer from. Regulated clients often want this on; consumer brands usually want it off.
Personalise Replies with Chat History	Whether responses take the user's prior conversation into account.

Handling the edge cases

Scenario	Configuration
Bot cannot answer	Set the fallback response. In practice this should route to Live Chat, not apologise into a dead end. Configure it that way in every demo.
Inappropriate language from the user	Set the response to abusive or inappropriate input.

The bot personality and model configuration includes integration with the ChatGPT model to extend conversational capability. Note for demos: settings changes take effect after cache clears, not instantly — do not change a setting mid-demo and expect it to show.

NEVER SAY THIS

"The AI will answer anything your customers ask." Say instead: "The AI answers from the content you give it, in the voice you configure, and hands anything outside that to a human — and you control where that line sits." The second version is true, sells better to risk-aware buyers, and does not create a delivery problem.

MODULE 7 · 25 minutes

Inbox and live agent operations

For most clients the inbox is where the product gets used every day, which makes it where renewal is won. It is also the part of the demo that operational buyers care about most and that sellers under-show.

7.1 The four tabs

Tab	Purpose
Chats	Every conversation across channels. Three-panel layout: chat list on the left, conversation in the centre, visitor profile on the right.
Orders	Orders generated by customers through WhatsApp bots, with full order detail on click. This is the Meta Catalogue / commerce story.
Contacts	Chats where contact details were captured, or that were marked as contacts by the chat flow.
Groups	Filter-built groups of contacts, used as campaign audiences. Where segmentation happens.

7.2 What an agent can do in a conversation

- Filter and search across chats.
- Assign tags to categorise the conversation.
- Assign the chat to another user, or transfer it.
- Download the chat transcript.
- Initiate a call.
- Set and manage chat status (statuses are configurable under My Account).
- Add internal notes.
- Send quick replies.

Bulk operations from the main Chats tab: download chat data, bulk delete, bulk close, bulk assign users, bulk assign tags. Show bulk close in demos to any client with a service backlog — it lands.

THE THREE INBOX QUESTIONS CLIENTS ALWAYS ASK

1. "Can I see which agent handled which conversation?" — Yes: assignment, transfer and notes are all recorded per chat.
2. "Can I get the transcript out?" — Yes: per-chat transcript download and bulk chat data download. Relevant to FAIS record-keeping (Module 23).
3. "Can the bot and a human be in the same conversation?" — Yes: that is the Live Chat component handing off, with the agent continuing in the same thread.

7.3 Agent discipline

The inbox is where the client's brand voice either holds or falls apart, so the operational habits you recommend at implementation matter as much as the configuration:

- Quick replies for anything said more than twice a day. Consistent wording, faster resolution, and no typos in front of a customer.
- One considered message rather than four fragments. “Hi”, then “How can I help?”, then the actual answer reads as three notifications on the customer’s phone.
- Tags applied consistently from day one, or the reporting is worthless in month three. Agree the tag taxonomy during implementation, not after.
- Notes for context, not for commentary. Assume the customer could one day see a transcript.
- Chat status kept current — it is the only way a supervisor can see what is actually open.

MODULE 8 · 20 minutes

Campaigns: broadcasts and drips

Campaigns are what turn a service tool into a revenue tool, and they are usually what unlocks marketing budget rather than IT budget. Broadcast and drip both run on WhatsApp, Facebook and Telegram, and the process is the same across all three. The client needs at least one bot on the relevant channel.

8.1 Broadcast — the build

1. Bots → select bot → Automation → Broadcast → Create New Broadcast.
2. Name the broadcast.
3. What to send: select the approved template or message.
4. Whom to send: choose the audience from the available options (this is where Groups earn their keep).
5. Timing: Now or Later.
6. Create Broadcast.

THE BIT SELLERS SKIP

Marketing, utility and authentication messages require an approved template. Service messages are free-form. A client who wants to broadcast next Tuesday needs templates submitted and approved well before then, and template approval is Meta's timeline, not ours. Build it into every project plan — and note that multiple template variations submitted in parallel is the standard mitigation for approval delays.

8.2 Drip campaigns

Drips are sequenced, triggered message series across the same three channels — onboarding sequences, abandoned-enquiry nudges, renewal reminders, event countdowns. Position drips as the answer to “we do not have the capacity to follow up on every lead”, because that is exactly the problem they solve and it is a problem sales leaders will fund.

8.3 What to check before you promise a campaign

- Opt-in provenance. Where did this list come from and what were people told? A migrated email list is not a WhatsApp opt-in — POPIA re-consent is a real workstream, as it was on the CR Brand Solutions engagement.
- Messaging limit. A client on the default 250-unique-customers-per-day tier cannot broadcast to 50,000 people on day one. See Module 12.
- Category. Is the message genuinely utility, or is it marketing wearing a utility hat? Mis-categorising templates is a fast route to a quality-rating problem.
- Vertical restrictions. Gambling, real-money gaming and several regulated categories cannot use marketing templates at all. See Module 23.

MODULE 9 · 30 minutes

Integrations and extensibility

Integration questions are where deals get technical and sellers get vague. You do not need to be able to build the integration. You need to know which of the three integration routes applies, and whether it is configuration or a billable professional services line.

9.1 The three routes

Route	What it is	Effort
Native connector	Pre-built integration selected from the 3rd Party Apps Integrations list — 60-plus connectors covering HubSpot, Zoho, Pipedrive, Salesflare, Freshworks, Freshdesk, Zendesk, Zoho Desk, Bitrix24, Insightly, Nutshell, Copper, Close, EngageBay, GoHighLevel, Jira, Intercom-class helpdesks, Google Sheets, Google Calendar, Google Contacts, Google Tasks, Google Analytics, GetResponse, SendinBlue, MoEngage, Infobip, Shipway, Wealthbox and more.	Configuration only
External API component	A flow calls the client's own REST API live, mid-conversation, and branches on the response. JSON REST with API key, JWT token, or public APIs.	Professional services
Outbound notification API	The client's own platform calls AI Studio to send a WhatsApp notification — template messages and free-form sends, plus contacts, tags and template-listing endpoints.	Client-side development

9.2 The API chat component — the twelve steps

Know this sequence well enough to sketch it on a whiteboard. It is the single most persuasive thing you can show a technical buyer.

1. Log in to the AI Studio dashboard.
2. More → Developers.
3. Create the custom attributes you will need to hold the data (My Account → custom attributes).
4. Developers → Your APIs → Add API.
5. Configure the API: name, method, URL, query parameters, headers, body. The interface is Postman-like.
6. Test the API with real values so the platform can learn the response structure.
7. Manage API Response: map response fields to AI Studio custom attributes.
8. Replace the test values with the mapped custom attributes.
9. Open the bot's chat flow.
10. Add the API chat component.
11. Select the configured API by name.
12. Map the next question per response code — 200, 300 and so on, with an "others" branch for anything unmatched.

CONSTRAINTS TO STATE OUT LOUD

WhatsApp only at present — coming for other channels, but not sellable today.

JSON-based RESTful APIs with API key, JWT or public access. If the client's system speaks SOAP, or sits behind an on-premise firewall with no exposed endpoint, that is a client-side workstream before anything else happens.

Custom variables use “/” as the placeholder in configuration, and actual values are needed for the initial test.

9.3 Custom attributes, tags and chat status

Three small features that carry disproportionate commercial weight because they are how a client's own structure gets modelled in the platform:

- **Custom attributes** — the data fields captured in a flow, populated from API responses, and used in personalisation. Dealer code, policy number, membership tier, vehicle registration, branch.
- **Tags** — categorisation applied to chats and contacts, used for filtering, reporting and campaign audience building.
- **Chat status** — configurable states that let the client model their own service workflow rather than adopt ours.

MODULE 10 · 15 minutes

Team, roles and governance

Short module, disproportionate importance: this is what a security or compliance reviewer will ask about, and it is what makes multi-agent and multi-branch deals workable.

10.1 Roles and users

- **Team roles** — module-based permission sets. For each platform module a role is granted view, edit, or none. Roles are named and reusable.
- **Team users** — individuals assigned a role. Created with name, email, phone number, role and password. Manageable, editable and bulk-deletable.

Build order: create the role first, then add users to it. Demo it in that order or you will get stuck.

LICENSING CONSTRAINT — VERIFY BEFORE QUOTING

The Resource Centre states that only the paid “King” plan supports more than one team member (three), with more available on request to support. The commercial model actually sold in South Africa prices agent seats individually as Live Agent Chat Profiles on the rate card. Treat the Resource Centre statement as legacy documentation and quote from the rate card — but this contradiction needs resolving in the Resource Centre itself. Logged in Appendix C.

10.2 The governance answers clients need

Client question	Answer
“Can I restrict who sees conversations?”	Yes — via module-level role permissions, and via sub-tenant separation where the requirement is between business units rather than between individuals.
“Can I stop an agent exporting data?”	Permissions are module-level. Confirm the specific granularity of transcript-download restriction with the platform team before committing — flagged.
“Who can change the bot?”	Any role with edit permission on bot modules. Recommend restricting flow editing to two named people at the client, plus S10U.
“What happens when an agent leaves?”	Delete or disable the user; conversation history and assignment records remain against the chat.

PART C

Meta Platform Fundamentals

Modules 11 – 13. The rules of the channel. This is the part of the pack that separates a seller who can hold a room from one who has to phone a technical resource. Learn it properly.

MODULE 11 · 25 minutes

Onboarding, verification and trust markers

11.1 The onboarding sequence

Whether automated or manual, the same things have to be true before a bot can send a message. The manual route makes each step visible, so learn it in that order:

1. Meta app created (or S10U's app used, under automated onboarding).
2. WhatsApp number registered and verified with Meta.
3. Webhook subscribed so inbound messages reach AI Studio.
4. A system user assigned to the WhatsApp account with the right permissions.
5. The client's own payment method attached to their WhatsApp Business Account — see Module 13.
6. Credentials and IDs collected from the Meta developer dashboard and configured in AI Studio.
7. Business profile completed — display name, description, category, logo, address.

TWO THINGS TO SET EXPECTATIONS ON IN EVERY DEAL

Meta Business Verification is a Meta process on a Meta timeline. Nobody in the delivery chain can accelerate it. Never quote a go-live date that assumes it clears in a week.

Business profile category and display name matter for regulated verticals. Choose them deliberately — see Module 23.

11.2 The green tick (Official Business Account)

Clients ask for this constantly and it is a genuine trust asset. It is also gated, and the gates are not ours:

Prerequisite	Detail
WhatsApp Business API account with Facebook Business Verification	Non-negotiable starting point.
2-step authentication enabled	Security requirement.
Registered official business entity	Individual businesses are not currently eligible.
At least three organic public relations mentions	Earned press coverage. Paid PR does not count. This is the requirement that fails most SME applications.

Prerequisite	Detail
Messaging tier 2 or above	Recommended rather than absolute — but a brand-new number at 250 per day is unlikely to succeed.

Application path: Meta Business Suite → Settings → Business settings → Accounts → WhatsApp Account → select account → Settings → WhatsApp Manager → select the account → Official Business Account → Submit request → complete and submit. Approval arrives by email.

HOW TO ANSWER “CAN YOU GET US THE GREEN TICK?”

“We will submit and manage the application, and we will tell you honestly whether you qualify before we do. The binding requirement is three pieces of organic press coverage — paid placements do not count. If you do not have that yet, the honest answer is that the application will be declined and we should build the PR case first.” Over-promising the green tick is one of the fastest ways to poison a new account relationship.

MODULE 12 · 40 minutes

Message categories, windows, templates and limits

If you learn one module cold, learn this one. Nearly every “why can’t we just message them?”, every campaign timing question and every compliance issue traces back to these four concepts.

12.1 The four message categories

Category	What it covers	Template required?
Marketing	Promotions, offers, product and feature announcements, targeted campaigns, cart abandonment reminders, retargeting.	Yes — approved template
Utility	Follow-up on a user action or request. Opt-in and delivery management, order and account updates, payment reminders, feedback surveys.	Yes — approved template
Authentication	One-time passcodes for verification, login, account recovery and integrity challenges.	Yes — approved template
Service	Resolving customer enquiries and support. Free-form replies from a human agent or from the AI.	No — free-form

12.2 The 24-hour customer service window

- A customer messages the business. A 24-hour window opens, resetting each time they message again.
- Inside the window: free-form messages and template messages are both permitted.
- Outside the window: template messages only. There is no free-form route back to a customer who has gone quiet — this is the single most important constraint to explain to clients who imagine WhatsApp works like email.
- Entry-point conversations opened when a customer messages via a Click-to-WhatsApp ad or a Facebook Page call-to-action button, and the business replies within 24 hours, run for 72 hours instead of 24 and close all other open conversations with that customer.

THE ONE-SENTENCE VERSION FOR CLIENTS

“Your customer opens the door for 24 hours. Inside that window you can say anything. Once it closes, you can only knock with a pre-approved template — so the design goal is to resolve inside the window, and to give people a reason to open it.”

12.3 Templates

- Templates can be created in WhatsApp Manager or from the AI Studio template tab.
- Each template is submitted with a category. Meta reviews and approves, rejects, or re-categorises.
- Rejections and re-categorisations happen. Build template approval into the project plan as a dependency with float, and submit variations in parallel where the message is business-critical.

- Template build is a billable line on the Everlytic rate card, charged per HSM. Count the templates from the flow design when scoping — it is one of the most commonly forgotten quote lines.
- Approval is not a billable event on Meta's side. Getting a template approved costs the client nothing; Meta's charge arises only when messages are actually sent to recipients. See Module 13.

12.4 Messaging limits and quality rating

Two mechanics that determine what a client can actually do at launch, and which sellers routinely fail to explain:

Messaging limits

A new number starts at 250 unique customers per 24 hours. Meta reassesses each time a new conversation with a unique customer is initiated, and raises the limit one level if all three of the following hold:

- The phone number status is Connected.
- The phone number quality rating is Medium or High.
- In the last seven days, conversations were initiated with at least X unique customers, where X is the current messaging limit divided by two.

Where all three hold, the limit increases one level within 24 hours. Current limits are visible in WhatsApp Manager → Overview Dashboard → Insights — the panel only shows a limit once it has risen above the 250 default.

Quality rating

A measure of the number's reliability and trustworthiness when initiating conversations, driven largely by user blocks and reports. If a number is flagged within a seven-day period, Meta immediately drops the messaging limit by one level, reducing capacity to reach new customers.

WHY THIS MATTERS COMMERCIALLY

A client planning a 50,000-contact launch campaign cannot execute it on a new number. The correct answer is a warm-up plan: start with the most engaged segment, keep quality high, let the tier climb, then scale. Sellers who promise day-one scale create a rating problem in week two — and a damaged quality rating is far harder to recover than it is to avoid.

MODULE 13 · 20 minutes

Meta billing: who pays whom

A short module with one job: to make sure you can explain, in under a minute and without hesitating, that the client pays Meta directly and why that is entirely normal. Sellers who fumble this conversation create suspicion where there is none.

13.1 The structure

Who bills whom	For what
Everlytic invoices the client	AI Studio — set-up, platform rental, conversation volume, live agent profiles, and any professional services. All per the Everlytic AI Studio Rate Card.
Meta bills the client	Business-initiated template messaging, charged against the payment method the client loads onto their own Meta Business Manager.
Neither party bills for	Template approvals. Getting a template approved is not a billable event; Meta's charge arises only when messages are actually sent to recipients.

13.2 The client loads their own payment details into Meta

This is a hard requirement of onboarding, not a preference, and it belongs in discovery rather than being discovered during implementation. The client attaches a credit or debit card capable of international payments to their own Meta Business Manager, against their WhatsApp Business Account. From that point Meta charges the client directly for the template messages they send.

- The card sits in the client's Meta account, under the client's control. They can see it, change it and manage spend visibility themselves.
- Everlytic and S10U do not sit in the middle of that transaction. We do not resell it, we do not mark it up, and we do not invoice for it.
- The client's WhatsApp messaging spend appears on their own Meta billing, alongside any other Meta spend they already have.
- Meta's charge is per recipient message sent, not per template held. A client with fifty approved templates and no sends has nothing to pay.

13.3 The analogy that ends the conversation

USE THIS, ALMOST WORD FOR WORD

"It works exactly the way a Facebook or Instagram paid campaign works. You load your card into Meta Business Manager, you run the campaign, and Meta bills you directly for what you ran. Nobody in between takes a cut of your media spend. WhatsApp template messaging is the same arrangement — your account, your card, billed by Meta. What you pay us for is the platform and the work, which is what you see on the Everlytic rate card."

Almost every client you meet is already running paid social. The moment you connect WhatsApp billing to something they already do without a second thought, the objection disappears. Reach for the analogy early rather than defending the arrangement after the fact.

13.4 What to say when asked “so what will Meta cost us?”

- Do not quote Meta rates. They are set by Meta, they vary by category and by market, and they are revised on Meta’s own schedule — a figure you quote today can be wrong by the time the client acts on it, and they will hold you to it.
- Direct them to Meta’s own published pricing for the WhatsApp Business Platform. It is public, authoritative and current, and pointing a client at the source reads as confidence rather than evasion.
- Frame the variable in terms they control: it scales with how many business-initiated messages they choose to send, which is a decision they make campaign by campaign rather than a fixed cost we impose.
- Where a client wants a spend forecast, build it with their volume assumptions and against Meta’s current published rates at that time. A model they helped build is defensible; a number you invented is not.

QUOTE DISCIPLINE

In every proposal, the Everlytic line and the Meta line are shown separately, and the Meta line is described as client-direct rather than given a figure. Clients who cannot see the split assume the worst; clients who see a figure we invented will hold us to it.

13.5 Objection pre-empt

“Why do I have to give Meta my card? Can’t you just bill me for everything?” — Because the WhatsApp Business Account is yours, in your name, with your brand on it, and Meta bills the account holder. That is also in your interest: the messaging sits in your account, the sending history and the data belong to you, and if you ever changed providers none of that moves. Consolidating it through us would mean renting your own channel back from us.

PART D

Commercials

Modules 14 – 16. The structure of the rate card, how to build a quote that survives review, and the reseller tier programme.

MODULE 14 · 30 minutes

The commercial model and the rate card

ONE SOURCE OF PRICING, AND THIS IS NOT IT

All AI Studio pricing lives in the Everlytic AI Studio Rate Card — the single controlled document, applicable to customers in the Republic of South Africa. It carries its own validity period on the face of the document; check it and make sure you are working from the current issue.

This module teaches the structure of that rate card: what the line items are, what unit each is charged on, and how to assemble them into a quote. It deliberately carries no rand figures. Training material goes stale; the rate card does not. Always quote from the current rate card, and confirm figures with Hannes Esterhuizen before they appear in a client document.

14.1 How the commercial conversation is framed

The rate card sets out a three-step client journey, and it is worth using that framing in the room because it matches what the client will read:

Step	What happens
1 — WhatsApp Business API setup	Where the client does not already hold a WhatsApp Business API account, we help them upgrade from their standard account. Setup is handled securely via their own Meta Business Manager, and NDAs or agreements can be provided where required.
2 — Choose AI templates against business goals	Templates are selected according to what the client is trying to achieve: driving sales and conversions, improving customer support, or increasing engagement and retention.
3 — Link AI Studio to the WhatsApp Business API	A once-off set-up fee plus a monthly AI Studio rental, with the monthly conversation volume tailored to the client. Project-based fees apply to certain features, scoped through a briefing meeting and then quoted in detail.

USE THE BRIEFING MEETING PROPERLY

The rate card explicitly positions a briefing meeting before a detailed tailored quote is issued. That is a gift — it gives you a legitimate, client-sanctioned reason to run proper discovery before committing to numbers, and it means nobody expects a price in the first meeting. Do not skip it to look responsive.

14.2 Rate card structure — SaaS and CPaaS platform

Learn the line items and their units. These are what you assemble a monthly figure from:

Line item	Unit	Notes for sellers
Account set-up fee	Once-off	Charged per environment, not per client. A multi-tenant rollout carries one per environment.
AI Studio rental	Monthly fee	The base platform licence. Also per environment.
Conversation tiers	Monthly fee	Tiers run 1,000 / 2,000 / 3,000 / 5,000 / 10,000 / 25,000 / 50,000 / 100,000 daily conversations. Fixed monthly fee; the allowance resets every 24 hours — see below.
Live agent chat profile	Monthly per agent	One per human who will work in the inbox. Count admin and oversight users too.
Ad hoc AI bots	Per hour	Bot build and configuration work outside the base scope.

HOW THE CONVERSATION TIER ACTUALLY WORKS

The client pays a fixed monthly fee for their chosen tier, per the rate card. That tier is a daily allowance, and it resets every 24 hours — so the client has access to the full tier volume again each day, every day of the month, for the same fixed monthly price.

A client on the 1 000 tier therefore has 1 000 conversations available today, 1 000 again tomorrow, and 1 000 the day after. They are not buying 1 000 conversations for the month.

This is the single most valuable thing on the rate card to explain properly, and the single easiest to get wrong. Read it as a monthly bundle and you will quote a client into a tier many times larger than they need — which either loses the deal on price or has you defending a number you cannot justify.

Sizing the tier

Because the allowance is daily rather than monthly, you size against a busy day, not against a monthly total:

- Ask for conversation volume on a typical day and on their busiest day — month-end, payday, campaign send day, first day of a school term, whatever their peak is.
- Size the tier to comfortably cover the busy day. A tier sized to the average will run out precisely on the days the client most needs it working.
- Then sanity-check the monthly picture: a client averaging 300 conversations a day is not a 10 000 client because they do 9 000 in a month. They are a 1 000 client with headroom.
- Where the client runs seasonal peaks well above their baseline, discuss tier movement rather than quoting for the peak all year.

SELL THE RESET — IT IS A GENUINE STRENGTH

"You are not buying a monthly pool of conversations that drains as the month goes on. You pay one fixed monthly fee and your full daily allowance is available again every 24 hours. A busy Monday does not borrow from your Friday, and a big month does not leave you rationing conversations in the last week."

That is a materially better commercial proposition than a depleting monthly bundle, and clients who have used bundle-based tools elsewhere recognise it immediately. Make the point explicitly rather than assuming they will infer it.

14.3 Rate card structure — WhatsApp services

The professional services lines. Every one of these is billable and every one of these gets forgotten in quotes:

Line item	Unit	What it covers
Custom development	Per hour	Includes CRM integration. This is the line the API chat component work sits on.
Consulting	Per hour	Advisory and solution work.
Strategy	Per hour	Conversation strategy, journey design, campaign planning.
Design	Per hour	Visual and creative work.
Copywriting	Per hour	Message and template copy, bot voice.
WhatsApp template messages (HSM)	Per HSM	One charge per template built. Count them off the flow design.
AI Studio / WhatsApp hosting	Per page	Hosted page assets.
Technical support	Per hour	Support beyond the standard entitlement.
Reporting	Once-off	Reporting setup.

14.4 Meta messaging is not on the rate card

Deliberately so. Meta bills the client directly for template messaging against the client's own payment method in their own Meta Business Manager, exactly as it does for their Facebook and Instagram advertising. Module 13 covers how to explain this. In a quote it appears as a separate client-direct line with no figure attached, and clients asking what Meta charges are pointed at Meta's own published platform pricing.

14.5 What the rate card does not include

- Meta template messaging — client-direct, per Module 13.
- Website, live chat and landing page bot subscriptions — separate subscription and separate pricing structure from WhatsApp.
- Client-side development on the client's own systems to expose APIs or endpoints.
- Content production beyond the copywriting line — if the client's product information does not exist in a usable form, that is a scoped workstream.
- Anything in the multi-tenant model beyond a single environment. Set-up, rental, conversation tier and agent profiles all multiply per environment.
- VAT. All rate card figures exclude VAT and are in South African Rand.

MODULE 15 · 35 minutes

Building a quote that survives review

Most quote rework comes from three causes: an uncounted agent seat, a conversation tier taken from a volume figure nobody clarified, and professional services estimated rather than scoped. Work the checklist and you will not be sent back. Figures come from the current rate card; this module is about getting the composition right.

15.1 The quoting checklist

#	Item	Where it comes from
1	Number of environments (tenants / sub-tenants)	Client's structure — one per brand, dealership, branch or subsidiary requiring data separation
2	Account set-up fee × environments	Rate card, once-off
3	AI Studio rental × environments	Rate card, monthly
4	Conversation tier × environments	Client's expected volume on a busy day, not their monthly total — the tier is a daily allowance that resets every 24 hours (see 14.2)
5	Live agent chat profiles × environments	Count of humans who will work in the inbox, plus admin and oversight users. Ask who covers leave and after-hours
6	Ad hoc AI bot hours	Bot build and configuration effort beyond base scope
7	Professional services hours	Scoped, not guessed: custom development and CRM integration, consulting, strategy, design, copywriting, technical support
8	Template (HSM) count	One charge per template built. Count them off the flow design, not off memory
9	Hosting pages	Where hosted page assets form part of the solution
10	Reporting	Once-off, where reporting setup is in scope
11	Meta line	Shown separately as client-direct with no figure, per Module 13
12	Exclusions and assumptions	Everything in 14.5, plus anything client-side

15.2 Worked structure A — SME, single environment

Profile: single-brand retailer, one WhatsApp number, two service agents, modest conversation volume, AI trained on website and FAQ content, no system integration. The quote is composed of:

Once-off	Monthly recurring
Account set-up fee × 1	AI Studio rental × 1
Ad hoc AI bot hours — bot build	Conversation tier — lowest tier
Copywriting hours	Live agent chat profile × 2
Template (HSM) builds × 3	

Plus a client-direct Meta line with no figure. Nothing else applies — no integration, no strategy retainer, no hosting.

15.3 Worked structure B — mid-market with integration

Profile: national distributor, one environment, seven agents across field sales and admin, meaningful conversation volume, live lookup into their CRM. This is the shape of the Motul-type engagement, where seven licences covered five field sales agents plus two for motorcycle and neighbouring-country leads and management oversight.

Once-off	Monthly recurring
Account set-up fee × 1 Ad hoc AI bot hours — bot build Custom development hours — CRM integration Strategy hours Design hours Copywriting hours Template (HSM) builds Reporting setup	AI Studio rental × 1 Conversation tier — sized to volume Live agent chat profile × 7

THE SEAT COUNT CONVERSATION

Seat counts are where mid-market quotes go wrong, in both directions. Do not accept “about five” — walk the actual roles. On the Motul engagement the honest answer was five field sales agents handling the passenger car leads that made up the overwhelming majority of volume, plus two more to cover the motorcycle line, neighbouring-country enquiries and management oversight. Ask about product specialisation, territory and who watches the queue, and the number arrives on its own.

15.4 Worked structure C — multi-tenant dealer network

Profile: OEM with 38 dealerships. This is the structure that most needs to be presented honestly, because the naive quote and the correct quote differ by an order of magnitude.

Configuration	Structure	Commercial composition
OEM-central	One environment. Agents pooled centrally, dealer routing handled inside the flow via custom attributes.	One set-up fee, one rental, one conversation tier, agent profiles × pooled agent count
Hybrid	OEM-central environment plus discrete environments for the largest dealer groups only.	Set-up and rental × environment count, conversation tier per environment, agent profiles per environment
Full dealer rollout	38 discrete environments, each with its own bot, inbox and data separation, minimum one agent seat each.	Set-up fee × 38, rental × 38, conversation tier × 38, agent profiles × 38 minimum

HOW TO PRESENT OPTION THREE WITHOUT LOSING THE DEAL

Quote all three configurations side by side, exactly as was done on the BYD scoping. Show the full rollout composition rather than hiding it — it is what makes the central option look like the intelligent choice rather than the cheap one. State plainly that economies of scale apply at that magnitude and that a sliding-scale discount will be tabled once the configuration is elected in writing. Never invent the discount yourself in the room.

PHASING IS A COMMERCIAL TOOL

On large rollouts, recommend a phased approach — a central phase first, then staged scale-out. It manages the client's cost absorption, it lets operational learnings shape later phases, and it converts an intimidating annual number into an approvable first step.

MODULE 16 · 20 minutes

The reseller programme

The reseller channel is a distinct motion with its own economics. If you sell direct you still need to know this, because the partners recruited into the programme are also the people you will meet on your own deals if the rules are explained badly.

16.1 Tier structure

Tier	Position	Quarterly prizes
Bronze	Entry tier. Lowest discount band.	No
Silver	Second band. Discount steps up.	Yes
Gold	Third band.	Yes
Platinum	Top band. Highest discount.	Yes

Four tiers, each with a defined discount off rate card list pricing and a monthly recurring revenue threshold that qualifies a partner for it. The discount percentages and the MRR thresholds are set in the reseller programme terms, which are the controlled source for them exactly as the rate card is the controlled source for pricing. Neither set of figures is reproduced here.

- Tier is assessed on monthly recurring revenue placed through the reseller.
- The tier discount applies off Everlytic AI Studio Rate Card list pricing, across set-up, rental, conversation tiers, agent profiles and professional services.
- A reseller's cost on any line is therefore that line's current rate card price less their tier discount. Work it from the live rate card, never from a figure in training material.
- Onboarding runs as a 90-day programme structured to get a partner to their second and third client, not to celebrate the first.

CONFIRM BEFORE THIS GOES TO PARTNERS

Tier discount percentages, MRR thresholds and the prize structure must be taken from the current reseller programme terms, not from memory and not from earlier design work. Confirm them before they are stated to a prospective partner. Logged in Appendix C.

16.2 The honest reseller pitch

Run the maths in front of a prospective partner using the live rate card rather than promising them a margin. Two points to make plainly:

- At Bronze, a single mid-market client generates a modest monthly margin. The programme becomes commercially interesting at Silver and above, which is precisely why the onboarding programme is built around volume of clients rather than the first win.
- Professional services are where a capable partner makes real money, because they can deliver strategy, copy and design themselves at their own rates while buying platform at tier cost.

16.3 Channel conflict rules

- Register the deal. An unregistered opportunity is not protected, and a reseller who finds S10U direct in their account will not stay a reseller.
- A reseller sells at their own price above their tier cost. Never quote list pricing to a reseller's client — you have either undercut your partner or exposed their margin.
- Professional services delivered by S10U on a reseller deal are billed to the reseller at their tier rate, not to the end client, unless the parties agree otherwise in writing.
- Meta messaging is client-direct on a reseller deal exactly as it is on a direct deal. The end client loads their own card into their own Meta Business Manager — the reseller does not sit in that transaction either.

PART E

Selling

Modules 17 – 24. Qualification, discovery, verticals, the demo, objections, competitive positioning, compliance, and getting from a verbal to a signed SOW.

MODULE 17 · 30 minutes

Ideal customer profile and qualification

17.1 What a good AI Studio client looks like

Signal	Why it matters
High inbound enquiry volume they cannot service well	The pain is already funded — they are paying for it in call centre cost, lost leads or complaints. You are reallocating spend, not asking for new spend.
A sales or service team whose response time determines revenue	Automotive leads, insurance quotes, property enquiries, education applications. Speed is measurable and the ROI argument writes itself.
An existing WhatsApp presence that has outgrown handsets	Somebody is already answering WhatsApp on a phone in the corner. That is proof of channel fit and a clean migration story.
Repetitive, documentable questions	The knowledge base can be built. If every enquiry is bespoke, the AI layer delivers less and the deal gets thinner.
Multi-site, multi-brand or dealer structure	Sub-tenant architecture is a genuine differentiator here and the deal size multiplies.
A system of record with an accessible API	Enables the integration story, which is what moves a deal from “chatbot” to “platform”.
A named internal owner	Deals without an internal project owner stall in template approval and content gathering, every single time.

17.2 Disqualifiers — walk away or reshape

Signal	What to do
No registered business entity, or no website with a privacy policy	Cannot onboard. Tell them what they need and diarise a follow-up.
Use case breaches WhatsApp Commerce Policy	Reshape into a permitted service use case or decline. See Module 23.
Wants to buy a bulk-SMS-style blast tool	Wrong product and a quality-rating disaster waiting to happen. Point them at Everlytic’s email and SMS capability instead.
No card capable of international payments to load into their own Meta Business Manager	Hard blocker — Meta bills the account holder directly. Resolve before scoping.
“We just want to test it for free”	There is no free trial on WhatsApp and the Resource Centre is explicit that anyone offering one is misrepresenting. Offer a paid pilot with a defined scope instead.

Signal	What to do
Expects the AI to replace their contact centre entirely	Reset the expectation in discovery or inherit a failed implementation.

17.3 Qualification framework

Five things to establish before you build a quote. If you cannot answer all five, you are not ready to price.

Dimension	The question behind it	What good looks like
Pain	What is broken, and what does broken cost them per month?	A number they say out loud — headcount, lost leads, average handling time, complaint volume.
Volume	How many inbound conversations on a normal day, and on a busy day, across all channels?	A figure with a source, not a guess. The busy-day number is what sizes the conversation tier, because the tier allowance resets every 24 hours.
Structure	One brand and one team, or many?	Determines environments, and therefore the deal size.
Systems	What is the system of record, and does it have an API?	Named system, named owner, known API status.
Authority and timing	Who signs, what is the budget cycle, what event forces a date?	A signatory name and a real driver — campaign launch, season, regulatory date.

MODULE 18 · 30 minutes

Discovery question bank

Use these as a bank, not a script. Ten well-chosen questions beat forty. The italicised note under each group tells you what you are actually listening for.

18.1 Current state

- How do customers reach you today, and which of those channels do they actually prefer?
- Is anyone answering WhatsApp for you right now? On a handset, or through a system?
- Walk me through what happens from the moment an enquiry arrives to the moment it is resolved.
- What proportion of enquiries are the same handful of questions?
- Where does an enquiry most often get stuck?

Listening for: *an existing informal WhatsApp presence, a documented process you can automate, and the specific stall point that becomes your ROI story.*

18.2 Volume and cost

- Roughly how many inbound enquiries do you handle on a normal day, and on your busiest day?
- What drives your peaks — month-end, payday, campaign sends, seasonal intake?
- How many people touch those enquiries, and what does that team cost you?
- What is your current average response time, and what would you want it to be?
- How many enquiries do you think you lose because nobody got to them in time?
- Are you already spending anything with Meta on WhatsApp today?

Listening for: *the conversation tier — which is sized on a busy day, not a monthly total, because the allowance resets every 24 hours — plus the seat count and a cost-of-status-quo figure to put next to your quote.*

18.3 Content and knowledge

- Who owns the accurate version of your product and pricing information, and what format is it in?
- Do you have an existing FAQ, or a list of your top call reasons?
- How often does that information change, and who approves changes?
- Are there questions you would never want a bot to answer?

Listening for: *whether the knowledge base is a configuration task or a content project, and where the escalation boundary sits.*

18.4 Systems

- What is your system of record for customers — CRM, ERP, policy admin, dealer management system?
- Does it have an API, and is it reachable from outside your network?
- Who owns it internally, and are they available for this project?
- What would a customer need to be told during a conversation that only that system knows?

Listening for: whether you can offer a native connector, an API component build, or neither. The last question is the one that turns integration from a cost into a benefit.

18.5 People and process

- Who will work in the inbox day to day, and how many of them?
- How do enquiries get routed today — by product, by region, by whoever is free?
- Who needs to see what? Should agents see each other's conversations?
- Who covers after-hours and weekends?

Listening for: seat count, routing logic to build with custom attributes, and role permission design.

18.6 Compliance and risk

- Are you in a regulated sector? Who signs off on customer communications?
- How do you handle a customer asking for their data, or asking to be deleted?
- Do you have record-keeping obligations on customer communications, and for how long?
- Where did your existing contact list come from, and what were those people told?

Listening for: POPIA and sector obligations that need to appear in the SOW, and whether the contact base needs re-consent before any campaign runs.

18.7 Decision

- Who else needs to be comfortable with this before it goes ahead?
- What is driving the timing — is there a date this has to be live for?
- What would make you decide not to do this?
- If we got this right, what would you be able to do that you cannot do today?

MODULE 19 · 30 minutes

Verticals and use cases

Sector fluency shortens deals. Each vertical below carries the pattern that works, the trap to avoid, and where we already have relevant engagement experience to draw on.

19.1 Automotive — OEM, dealer network, aftermarket

- **Pattern:** lead capture and instant routing to the nearest or right-specialised dealer or field agent, with product advisory from the knowledge base, test-drive and service booking, and campaign follow-up on unconverted leads.
- **Architecture:** OEM-central with dealer routing via custom attributes, or per-dealer sub-tenants where dealers own their own customer relationships. Present both and let the commercial reality decide.
- **Trap:** dealer politics. Dealers will ask who owns the lead and who sees the conversation. Have the answer ready before the OEM asks you in front of them.
- **Relevant experience:** AutoTrader SA, BYD Auto SA dealer network scoping, Motul SA field-sales lead routing.

19.2 Financial services and insurance

- **Pattern:** policy and account servicing, document requests, claims status, quote initiation, authenticated self-service via API lookup, with human escalation for anything advisory.
- **Trap:** advice. The moment a bot appears to give financial advice, FAIS applies to the output. Design the boundary explicitly and put it in the SOW.
- **Non-negotiables:** record-keeping of written communications, retention periods, and a clean POPIA position on access, correction and deletion requests. Module 23 covers this properly.
- **Relevant experience:** NVest Financial Holdings, Constellation Financial Services.

19.3 Non-profit and fundraising

- **Pattern:** donation journeys, beneficiary and volunteer engagement, wish or application intake, campaign moments, recurring-giving reminders.
- **Commercial note:** budget is tight and seasonal. Consider phased scope and pro-bono or Section 18A structuring where appropriate — this is a commercial decision, not a seller's discretion.
- **Relevant experience:** Reach For A Dream (RFAD).

19.4 Retail and e-commerce

- **Pattern:** Meta Catalogue browsing, in-conversation ordering with orders landing in the Inbox Orders tab, order and delivery status via utility templates, abandoned-enquiry drips, returns handling.
- **Trap:** payment. Confirm what the gateway integration actually is before it appears in a proposal. On the CR Brand Solutions engagement it was scoped as a capability “subject to gateway provider API availability” precisely so it was not a hard commitment.
- **Relevant experience:** Pet Box, Document Excellence.

19.5 Travel, leisure and hospitality

- **Pattern:** enquiry to quote, booking confirmation and pre-arrival utility sequences, in-stay service, post-stay review and rebooking drips.
- **Strength:** high emotional engagement and a natural utility-message calendar, which makes the template strategy easy to build.
- **Relevant experience:** AfricaStay, Canopy Tour Group.

19.6 Education, training and skills bodies

- **Pattern:** application and enrolment funnels, learner support and reminders, document collection, cohort communication, stakeholder and accreditation queries.
- **Trap:** seasonal volume spikes around intake. Size the conversation tier against the peak intake day rather than the quiet weeks, and discuss tier movement around those peaks so the client is not surprised.
- **Relevant experience:** MICTSETA, Passion4Performance, Skoleondersteuningsentrum (SOS).

19.7 Healthcare

- **Pattern:** appointment booking and reminders, practice information, script and referral logistics, patient follow-up.
- **Trap:** clinical content and special personal information under POPIA. Health data is special personal information and carries a higher bar. Keep the bot administrative and route anything clinical to a human. Say this to the client before they ask.
- **Relevant experience:** Linova Healthcare.

19.8 Mining, industrial and B2B distribution

- **Pattern:** technical product advisory from datasheets, field-team enablement, order and stock enquiries, contractor and supplier communication, safety and compliance notifications.
- **Strength:** deep, documentable technical content that the knowledge base handles unusually well.
- **Relevant experience:** Valterra Platinum, Motul SA, Kareebu.

19.9 iGaming and gambling — proceed with care

- **Permitted:** service and support messaging to existing, verified, KYC'd customers. A VIP account-manager line is a legitimate and defensible use case.
- **Prohibited:** marketing templates promoting gambling — no bonuses, free spins, deposit matches, odds boosts or tournament promotion, even to opted-in users. This is what gets operators removed from the platform.
- **Also prohibited:** acquisition messaging. Existing verified customers only.
- **Setup discipline:** WABA category, display name and business description should reflect customer service and account management, not the gambling product. Opt-in must be explicit, logged and specific. Meta enforces per market, so a multi-jurisdiction operator must respect the strictest applicable rule per user.

RULE FOR REGULATED VERTICALS GENERALLY

Do not improvise. If a vertical has a regulator, the answer to "can we do X?" is "let me confirm the position and come back to you in writing." The deal survives a 24-hour delay. It does not survive a wrong answer that reaches the client's compliance officer.

MODULE 20 · 30 minutes

The demo

The demo is not a product tour. It is a fifteen-minute proof that the thing they described in discovery can exist. Structure it around their words, not our navigation.

20.1 Before the demo

- Have their discovery notes open. You will quote them back.
- Have a bot pre-built that resembles their use case, with their sector's vocabulary in it. A generic demo bot costs you the room.
- Have your own phone on the WhatsApp number, screen mirrored. WhatsApp demos land on a phone, not in a browser preview.
- Know which three things you are proving. Not thirty.
- Check your seat and volume assumptions so that when they ask "what does this cost?" you can describe the shape of the quote without improvising a figure.

20.2 The thirty-minute structure

Minutes	Segment	What you actually do
0–3	Play back the problem	Restate what they told you in discovery, in their language, and name the three things you are going to show. No company slide, no history of Meta.
3–10	Live customer journey on the phone	Send a real message. Show the AI answering from their kind of content, capturing data, and branching. Let it feel like a conversation, not a menu.
10–14	The handoff	Escalate to a live agent mid-conversation. Switch to the Inbox and reply as the agent. This is the single most persuasive moment in the demo — do not rush it.
14–19	The agent workspace	Tags, assignment, transfer, notes, chat status, quick replies, transcript download. Operational buyers decide here.
19–23	Their system in the loop	Show or describe the API component doing a live lookup. If you cannot show it, whiteboard it — the twelve steps in Module 9 are enough.
23–27	Growth	Broadcast and drip setup, and a group built from a filter. Marketing budget unlocks here.
27–30	Next step	One specific, dated next step with a named owner. Never "we will send you something".

20.3 What not to do

- Do not open the flow builder in the first ten minutes. It impresses builders and loses executives.
- Do not change an AI setting live and expect it to take effect — changes apply after cache clears.

- Do not demo a flow without an End chat on the last component. It errors, and it errors in front of the client.
- Do not show every one of the sixty-plus integrations. Show theirs, or the closest one, and move on.
- Do not answer a capability question you are unsure of. “I will confirm that in writing today” costs you nothing and buys you credibility.
- Do not volunteer commercials in a demo. If asked, confirm the shape — set-up, monthly rental, conversation volume, agent seats — and commit to a tailored quote after the briefing meeting.

MODULE 21 · 40 minutes

Objection handling

Each objection below gives you the real concern underneath, the response, and the trap. Learn the shape rather than the script — recited scripts are audible.

“It is too expensive.”

What they actually mean

Usually one of three things: they have not connected the cost to a return, they are comparing platform rental to a cheap off-the-shelf chatbot widget, or they have no budget line and need help finding one.

Response

- Go back to their own number from discovery. “You told me you have four people spending most of their day answering the same six questions. What does that cost you a month?” Then place the monthly figure next to it.
- Reframe against the alternative: the platform costs less than one additional service headcount, and it does not take leave.
- If they are comparing to a cheap widget, be specific about what the cheap thing does not do — official WhatsApp Business API access, template approval management, live agent handoff, sub-tenant separation, integration into their system of record, and a Meta-certified provider behind it.
- Offer scope reduction rather than discount: fewer templates, phase the integration, start on one environment. Protect price, shape scope.

Trap

Never discount off the rate card to save a deal in the room. Pricing is owned commercially and unauthorised discounting poisons the channel programme, where partners buy at defined tier rates.

“Why do we have to put our own card into Meta? Can't you just bill us for everything?”

What they actually mean

Either they suspect a hidden margin somewhere, or their procurement process dislikes a second payment relationship, or nobody has explained to them that this is entirely standard.

Response

- Lead with the analogy: it works exactly the way their Facebook and Instagram advertising already works. Card in Meta Business Manager, Meta bills them directly for what they run, nobody in between takes a cut of their media spend.
- Explain why it is in their interest: the WhatsApp Business Account is theirs, in their name, with their brand on it. The sending history and the data stay with them, and if they ever changed providers none of it moves.
- Be explicit that we do not resell, mark up or invoice Meta messaging. Saying it plainly removes the suspicion the question was really about.
- Point out that template approvals cost nothing — Meta's charge arises only when messages are actually sent, so they are never paying for capability they have not used.

Trap

Do not quote Meta rates to soften the objection. Direct them to Meta's own published platform pricing instead — it is public and current, and pointing at the source reads as confidence.

“Meta has its own AI now. Why would we pay you?”

What they actually mean

Genuinely reasonable question, and the most important objection in the pack. Full treatment in Module 22.

Response

- Acknowledge it properly. Meta Business Agent is a real product, and for a simple FAQ deflection use case it is a legitimate option.
- Then draw the line where it actually is: Meta Business Agent answers questions. It does not give you a multi-tenant structure across a dealer network, a live agent workspace your team works in all day, campaign and drip tooling, live lookups into your own systems, or configurable routing and permissions.
- Add the operational dimension: their agent is a channel feature they configure at the edges. This is a system their team works in, with routing, permissions, reporting and their own data in it.
- Close on control: “Their agent is a channel feature. This is your operating system for customer conversations, and you own how it behaves.”

Trap

Do not disparage Meta. They own the channel, the client knows it, and it makes you sound threatened.

“We are worried about data privacy and POPIA.”

Response

- Get the roles right first: they are the responsible party, S10U and Everlytic act as operator. Saying this correctly signals that we have done this before.
- Walk the three data subject request types — access, correction, deletion or suppression — and how each is handled operationally.
- For regulated clients, flag the interaction that matters: a deletion request does not override a statutory retention duty. In FAIS scenarios, suppression rather than erasure is the correct mechanism.
- Offer to have the specific platform capability items confirmed in writing and reflected in the SOW rather than asserting them in the meeting.

Trap

Do not commit to retention configuration, log immutability, export formats or erasure propagation behaviour off the cuff. Those items require platform verification — Module 23 lists them.

“Will it integrate with our system?”

Response

- Ask what the system is before answering. If it is on the native connector list, say so and name it.
- If not, explain the API component route: JSON REST with API key, JWT or public access, called live inside the flow, branching on the response code.
- Be explicit that the integration is a scoped professional services item at the rate card hourly rate, not an included feature.

- Name the client-side dependency honestly: they need an accessible endpoint and an available system owner.

Trap

Do not promise API-driven flows on website, Facebook or Telegram bots. The API chat component is WhatsApp-only today.

“What if the AI gets it wrong?”

Response

- Confirm the fear is legitimate and that the platform is designed around it rather than against it.
- Walk the controls: the knowledge base only contains content they supply; Answer Length, tone, persona and language are configured; source citation can be switched on; the unable-to-answer path is configurable and should route to a human.
- Recommend a staged launch — narrow scope, monitor transcripts, widen the knowledge base as confidence builds. Conversation history training then improves it from real usage.
- Offer the transcript review as a formal part of the first month.

“We already have a WhatsApp provider.”

Response

- Do not attack the incumbent. Ask what they can and cannot do today, and listen for the gap: usually multi-tenant separation, a real AI layer, live agent workflow, or integration.
- Ask what the incumbent charges and what is included, then be specific about what changes.
- Offer a parallel pilot on a second number or a single business unit rather than a rip-and-replace. Lower risk, faster decision, and the comparison makes the case for you.

“We will build it ourselves — we have developers.”

Response

- Concede the easy part: sending a WhatsApp message via the API is genuinely straightforward, and their team can do it.
- Then name what they will actually build: template lifecycle management, quality-rating and messaging-limit monitoring, an agent inbox with assignment and transfer, tenancy separation, campaign scheduling, drip sequencing, a knowledge base and retrieval layer, and Meta policy change tracking. Then maintain all of it.
- Ask what that team is not building while they build this.
- Offer to work alongside them instead: they keep their systems and data, we run the channel layer, and their developers build the integration on their side where their expertise actually is.

“Can we trial it for free first?”

Response

- Be straight: WhatsApp Business Platform terms do not allow free trials, and the Resource Centre says plainly that anyone advertising one is misrepresenting.
- Offer the alternative — a scoped paid pilot: one number, one use case, a defined conversation bundle, an agreed success measure and a defined end date.
- Point out the honest advantage: a paid pilot gets internal attention and a named owner. Free pilots get abandoned.

“Our customers will not want to talk to a bot.”

Response

- Agree that customers hate bad bots, and that they hate waiting more.
- Reposition: the bot exists so the human is available for the conversation that needs a human. The escalation path is a feature, not an admission.
- Show the handoff in the demo. It answers this objection better than any argument.

MODULE 22 · 30 minutes

Competitive positioning

22.1 Meta Business Agent — the competitor that matters

Meta has its own AI agent platform, and any partner or business can integrate with it. Treat it as a live competitor in every AI-on-WhatsApp conversation you work, and do not disparage it — the client knows Meta owns the channel, and sounding threatened costs you more than the comparison does.

Dimension	Meta Business Agent	S10U AI Studio
Answering customer questions	Yes, native to the channel	Yes, from client-supplied knowledge with configurable persona
Multi-tenant / sub-account separation	Not a Meta concept	Core architecture — dealer networks, franchises, agency sub-accounts
Live agent workspace	No agent inbox product	Full inbox: assignment, transfer, tags, status, notes, quick replies, transcripts, bulk operations
Handoff to human mid-conversation	Limited to what the integrating platform provides	Native Live Chat component in the flow
Deterministic flow control	Generative by design	Visual flow builder with multiple choice, keyword branching, API branching on response code
Live lookups into client systems	Depends on integration built	API chat component plus 60-plus native connectors
Campaigns and drips	Not a campaign product	Broadcast and drip across WhatsApp, Facebook, Telegram
Role-based permissions	Not applicable	Module-level roles and named users
Local implementation and support	None	SA-based Meta-certified provider, local delivery, local commercial terms in ZAR

THE POSITIONING SENTENCE

"Meta's agent is a smarter reply. AI Studio is how a business actually runs customer conversations — the automation, the humans, the campaigns and the systems behind them, in one place, under your control."

22.2 Where Meta Business Agent genuinely wins

Know this so you do not walk into it. If a prospect wants nothing more than generic FAQ deflection on one number, with no agents, no campaigns, no integration and no reporting requirement, Meta's native option is a reasonable choice and pushing a platform sale is a waste of both parties' time. Qualify it out early (Module 17) and spend the time on a deal that fits.

22.3 Other competitive sets

Competitor type	Their pitch	Where we win	Where we lose
Global BSP platforms	Scale, breadth of channels, brand recognition	Local implementation, ZAR commercials, responsiveness, sub-tenant flexibility, professional services in the same time zone	Enterprise procurement processes that shortlist on brand
Local WhatsApp resellers and small BSPs	Cheap, fast, personal	Depth of platform — AI layer, multi-tenant, integration, campaigns, roles	Small single-number deals where price is the only criterion
Chatbot widget tools	Cheap and quick to switch on	Official WhatsApp Business API access, template management, agent workspace, integration	Prospects who genuinely only need a website widget
Internal build	Full control, no licence fee	Time to value, and everything around the message that they have not scoped	Clients with a large idle engineering capacity and patience
Do nothing	No cost, no risk	The cost of the status quo, quantified in their own numbers from discovery	Clients with no measured pain

MODULE 23 · 35 minutes

Compliance: what sellers must get right

BOUNDARY OF THIS MODULE

This module equips you to have a credible conversation and to know when to stop. It is not legal advice and it does not replace compliance sign-off, which sits with Jermaine Chetty on the Everlytic side. Nothing in this module goes into a client document without that sign-off.

23.1 POPIA — get the roles right

Role	Who	What it means
Responsible party	The client	Determines the purpose and means of processing. Owns the lawful basis, the consent, and the obligation to respond to data subject requests.
Operator	S10U / Everlytic	Processes personal information on the responsible party's behalf, under their instruction, and must maintain appropriate security safeguards.
Data subject	The client's customer	Holds the rights of access, correction, and deletion or destruction.

Relevant provisions to be able to name without reaching for notes: POPIA sections 23 and 24 (access, and correction or deletion), plus the operator obligations. Do not attempt to interpret them in the room.

The three data subject request types

Request	What the client must be able to do	Platform implication
Access	Provide the personal information held, in an intelligible form.	Contact record and conversation transcript export.
Correction	Correct or update inaccurate information.	Editable contact record and custom attributes.
Deletion / destruction	Delete, or where a retention duty applies, suppress.	Contact deletion, or suppression state. This is where regulated sectors get complicated.

23.2 Financial services — FAIS record keeping

Where the client is an FSP, communications on WhatsApp are business records. The framework to know:

- FAIS Act section 18 and the General Code of Conduct (Board Notice 80/2003) impose record-keeping duties, including on written communications with clients.
- A five-year retention duty applies to the relevant records.
- Records of advice must be retained and retrievable.
- Where a third party keeps records on the FSP's behalf, the FSP remains accountable for their availability and integrity.

THE CRITICAL INTERACTION — KNOW THIS COLD

A POPIA deletion request does not override a FAIS retention duty. In FSP scenarios the correct mechanism is suppression, not erasure: stop using the data for communication, retain what the statute requires you to retain, and record the suppression state. A seller who says "sure, we can delete everything" in an FSP meeting has created a compliance exposure for the client and a rework item for us.

Verification items — not to be committed in writing until confirmed

These six items recur in FSP SOWs and must be confirmed with Renier van Wyk and Miguel Da Silva Ferreira before any language is committed:

1. Retention period configuration — is retention configurable per tenant, and to what granularity?
2. Log immutability — are conversation and audit logs tamper-evident?
3. Export format — what format, and does it satisfy "intelligible form" for a regulator?
4. Erasure versus anonymisation — what actually happens on deletion, and does it propagate across contacts, transcripts, campaign records and backups?
5. Suppression state — is suppression a distinct, persistent state separate from deletion?
6. DSAR audit trail — is there a record of requests received and actions taken?

23.3 Meta policy compliance

- The use case must comply with the WhatsApp Commerce Policy and the Meta Commerce Policy. Certain categories are prohibited outright.
- Service messaging and promotional messaging are treated differently. This distinction is commercially and architecturally significant for gambling, financial services and other regulated clients — some businesses can service on WhatsApp but cannot market on it.
- Opt-in must be explicit, specific and logged. A migrated email list is not a WhatsApp opt-in.
- Mis-categorising a marketing message as utility is a policy and quality-rating risk, not a clever workaround.

23.4 Other frameworks you may hear named

Framework	When it comes up
ECTA	Electronic communications, consent and electronic transactions.
FICA	Verification and record-keeping obligations for accountable institutions.
ISO 27001 / SOC 2	Enterprise security questionnaires. Route to the platform team — do not claim certifications.
SA National AI Policy Framework	Public sector and large enterprise AI governance discussions.
EU AI Act	Clients with European operations or European parent companies. On the horizon rather than immediate.

MODULE 24 · 25 minutes

From verbal to signed: the SOW pipeline

A verbal yes is not a deal. The SOW is where scope, price and expectations become binding, and where most delivery pain is either avoided or created.

24.1 The production pipeline

1. Record the discovery or demo call and produce a transcript.
2. Extract client details, confirmed scope, named stakeholders, systems, volumes and dates.
3. Populate the official SOW template.
4. Build Annexure A — the quote.
5. Build Annexure B — the process flow diagram.
6. Internal review: commercial figures, capability claims, dates, exclusions.
7. Compliance sign-off where the client is regulated.
8. Issue as DOCX plus PDF.

STANDING TEMPLATE RULE

Every Everlytic SOW is built on the official template file
20260324_Everlytic_S10U_AI_Studio_SOW_Template__with_Annex_A_Quote_and_B_Flow_Diagram_.docx.
Never reuse a previously filled-in client SOW as the base — inherited client detail in a new SOW is the single most damaging document error we can make.

24.2 Annexure A — the quote

- Every figure comes from the current Everlytic AI Studio Rate Card. Fee figures are never populated without commercial confirmation — pricing and commercial inputs are owned by Hannes Esterhuizen.
- Where a figure is not yet confirmed, leave a visible placeholder or a TBC note in the document. Do not omit the line and do not invent the number — an open item flagged in-document is correct; a silently missing line is not.
- Show once-off and monthly recurring totals separately.
- Show the Meta line separately, described as client-direct against the client's own Meta payment method, with no figure attached.
- State that all fees exclude VAT and are in ZAR.
- Where multiple configurations are in play, quote them side by side rather than picking one for the client.

24.3 Annexure B — the process flow diagram

The established default is a six-swimlane horizontal layout, adapted to the client's context:

Lane	Actor
1	Customer / end user
2	Meta WhatsApp Platform

Lane	Actor
3	BSP / Everlytic
4	S10U AI Studio
5	Client internal teams
6	External systems

Anything the client must provide or operate sits in lanes 5 and 6. That is deliberate: the diagram is also a dependency map, and it is far easier to have the “you need to give us an API endpoint” conversation with a picture than with a paragraph.

24.4 Scope hygiene — the five lines that prevent disputes

- A closed statement that anything not listed is excluded and subject to separate scoping and costing.
- Named client responsibilities: content, approvals, template sign-off, system access, an internal project owner.
- External dependencies with owners: Meta verification and template approval timelines, third-party API documentation and support.
- Assumptions, stated as assumptions — accessible API endpoints, Meta Business Manager in good standing, existing contact base and consent status.
- A risk table with mitigations, especially template approval delays, volume overruns and integration limitations.

24.5 Go-live date discipline

Never commit a date that depends on something we do not control without naming the dependency alongside it. The three that break dates:

- Meta Business Verification and green tick timelines.
- Template approval — including rejection and resubmission cycles.
- Client-side work: content, API endpoints, web development. A date that depends on the client’s web developer is a date that depends on the client’s web developer — say so in the document.

PART F

Assessment & Reference

Modules 25 – 26 and appendices. Knowledge check, role plays, glossary, source index and the open items register.

MODULE 25 • 45 minutes

Knowledge check

Thirty-four questions, closed book. 80% is the accreditation pass mark. Answer key overleaf — hand out separately.

#	Question
1	Name the four WhatsApp message categories.
2	Which categories require an approved template?
3	How long is the customer service window and what resets it?
4	What can you send outside the customer service window?
5	Which entry points open a 72-hour conversation window instead of 24?
6	What is the default messaging limit on a new number?
7	Name the three conditions for a messaging limit increase.
8	What happens to the messaging limit if the number is flagged?
9	Who pays Meta for template messaging, and how?
10	Which everyday marketing activity is Meta billing directly analogous to?
11	Is Meta's charge triggered by template approval or by messages sent?
12	Does Everlytic or S10U resell or mark up Meta messaging?
13	A client asks what Meta will charge them. What do you do?
14	Which document is the single source of AI Studio pricing?
15	Who confirms fee figures before they enter a client document?
16	How does a conversation tier work?
17	Which rate card lines are once-off?
18	Which rate card line is charged per agent?
19	Which rate card line covers CRM integration?
20	Which rate card line covers template builds, and on what unit?
21	Name the five AI training sources.
22	Which chat component hands a conversation to a human?

#	Question
23	Which component is mandatory at the end of a flow and why?
24	Which channels support the external API chat component?
25	What API types does the API component support?
26	Name the four Inbox tabs.
27	What must be created first: a role or a user?
28	List the five client prerequisites for a WhatsApp bot.
29	Which green tick prerequisite fails most SME applications?
30	Under POPIA, who is the responsible party and who is the operator?
31	What is the FAIS retention period, and what happens when a client requests deletion?
32	What is prohibited for gambling clients on WhatsApp, and what is permitted?
33	A client wants 38 dealership environments. What does that mean commercially?
34	Is there a free trial on the WhatsApp Business Platform?

MODULE 26 · 45 minutes

Role-play scenarios

Run each as a ten-minute live exchange with a colleague playing the buyer, then five minutes of feedback against the noted assessment points.

Scenario 1 — The procurement head who does not want a second payment relationship

Buyer brief: You are the procurement head at a national insurer. You have been told you must load a company card into Meta Business Manager and you do not like it — you want one supplier, one invoice, one payment relationship, and you suspect the vendor is avoiding responsibility for something. Open with: “Why can’t you just bill us for all of it? We do not open payment relationships with American platforms on a supplier’s say-so.”

Assessment points

- Did the seller reach for the paid-social analogy early rather than defending the arrangement?
- Did they explain that the WhatsApp Business Account is the client’s own, in the client’s name, and that Meta bills the account holder?
- Did they frame it as being in the client’s interest — their account, their data, their sending history, portable if they ever change providers?
- Did they state plainly that we do not resell or mark up Meta messaging?
- Did they avoid quoting Meta rates, and point at Meta’s published pricing instead?

Scenario 2 — The OEM marketing head with a dealer network

Buyer brief: You run marketing for a vehicle brand with 38 dealerships. Dealers are territorial and will resist anything that looks like head office taking their leads. You have been quoted a large number by another provider and you want to know why this is different. Somewhere in the conversation, ask: “Who owns the customer conversation — us or the dealer?”

Assessment points

- Did the seller establish structure before price?
- Did they explain the difference between OEM-central and per-dealer environments in the client’s own terms?
- Did they present configurations side by side rather than picking one?
- Did they resist inventing a volume discount in the room, and defer figures to a tailored quote after the briefing meeting?
- Did they have a credible answer on lead ownership and conversation visibility?

Scenario 3 — The compliance officer at an FSP

Buyer brief: You are the compliance officer at a financial services provider. The business wants WhatsApp; you are the person who can stop it. You will ask about record retention, what happens when a client asks to be deleted, and where the data sits. You are unimpressed by confidence and impressed by precision. Ask: “A client asks me to delete everything. What happens?”

Assessment points

- Did the seller correctly identify responsible party versus operator?
- Did they give the right answer on suppression versus erasure under a FAIS retention duty?
- Did they decline to commit on the six verification items rather than guessing?
- Did they offer to confirm in writing and route to compliance sign-off?
- Did they avoid claiming certifications we have not confirmed?

Appendix A — Glossary

Term	Meaning
24-hour window	Customer service window opened by an inbound customer message, inside which free-form replies are permitted.
BSP	Business Solution Provider — a Meta-approved partner providing access to the WhatsApp Business Platform.
Conversation	A 24-hour message thread between the business and a customer. The unit the Everlytic rate card tiers are expressed in.
Custom attribute	A configurable data field captured in a flow or populated from an API response, used for routing and personalisation.
Drip campaign	A sequenced, triggered series of messages.
DSAR	Data subject access request — a request under POPIA for access, correction or deletion.
FAIS	Financial Advisory and Intermediary Services Act. Imposes record-keeping duties on FSPs.
Entry-point conversation	A 72-hour conversation window opened via a Click-to-WhatsApp ad or Facebook Page call-to-action, where the business replies within 24 hours.
Green tick	Official Business Account verification badge on WhatsApp.
HSM	Highly structured message — a WhatsApp message template.
Meta Business Manager	The client's own Meta administration account. Where the WhatsApp Business Account sits and where the client loads the payment method Meta bills against.
Messaging limit	The number of unique customers a business can initiate conversations with per 24 hours.
MRR	Monthly recurring revenue — the metric governing reseller tier qualification.
Operator	Under POPIA, a party processing personal information on behalf of a responsible party.
POPIA	Protection of Personal Information Act.
Quality rating	Meta's measure of a number's reliability, driven by blocks and reports; governs messaging limit movement.
Responsible party	Under POPIA, the party determining the purpose and means of processing. The client.
Service message	A free-form reply sent inside the 24-hour customer service window, by a human agent or by the AI. No template required.
Sub-tenant	An isolated child account under a parent account, with its own bot, inbox, agents and data separation.
Template	A pre-approved message required for marketing, utility and authentication categories.
WABA	WhatsApp Business Account.

Appendix B — Source index

B.1 Primary internal sources

Source	Location	Used for
AI Studio Resource Centre	api.s10u.ai	Product capability, onboarding, bot management, inbox, campaigns, integrations, API references, FAQs
Agency dashboard	app.s10u.ai	Live platform for demos and configuration
Meta platform pricing	business.whatsapp.com	Where clients are directed for current Meta messaging rates — never quoted by us
Everlytic AI Studio Rate Card (RSA)	Controlled document — Everlytic	The single source of all AI Studio pricing. Carries its own validity period; always work from the current issue
Official SOW template	Everlytic S10 AI Studio SOW template (with Annex A and B)	Module 24 pipeline

B.2 Resource Centre sections worth reading in full

- [How AI Studio works → Bot Management](#) → Edit Your Chat Flow, Train Your AI Chatbot, Bot Settings (per channel), Marketing Automation, 3rd Party Apps Integrations.
- [How AI Studio works → Inbox](#) → Managing Contacts, Chats & Conversation; Creating Groups.
- [How AI Studio works → Teams](#), Subscriptions, My Account (custom attributes, tags, chat status), Notifications.
- [Product Guides & Training → WhatsApp Cloud API by Meta](#) (Business Manager setup, bot profile, green tick).
- [Product Guides & Training → Must know-how of AI Studio](#) (custom attributes, external API calls, team roles, notification APIs).
- [FAQs](#) → Onboarding, Bot Installation, Inbox, Profile/Team/Notifications, Analytics, Chat Flow, Bot Settings, WhatsApp, Subscription, ChatGPT.
- [Common Errors & Troubleshooting](#).
- [API References](#) → API access, Contacts, Tags, WhatsApp Bot, WhatsApp Cloud API (template and send-message endpoints).

Appendix D — One-page battlecard

Print this. Keep it in the notebook.

Prompt	Answer
What is it, in one sentence?	A WhatsApp-first conversational platform combining an AI knowledge layer, a live agent inbox and campaign tooling, with multi-tenant separation, from a Meta-certified South African provider.
Who do we contract through?	S10U builds and runs the platform; Everlytic is the commercial and delivery layer. Meta bills the client directly for template messaging.
Three questions to open with	1. How many inbound enquiries on a normal day, and on your busiest day? 2. Is anyone answering WhatsApp for you today, and how? 3. What is your system of record and does it have an API?
Where does pricing come from?	The Everlytic AI Studio Rate Card — the only source. Confirm figures with Hannes Esterhuizen before they enter a client document.
What builds a monthly figure?	AI Studio rental + conversation tier + live agent chat profiles, per environment. Set-up fee is once-off, per environment.
How the tier works	Fixed monthly fee, and the allowance resets every 24 hours — the full tier volume is available again every day. Size it against the client's busiest day, not their monthly total.
The Meta billing answer	"Same as a Facebook or Instagram paid campaign — your card in your Meta Business Manager, Meta bills you directly for what you send, nobody in between takes a cut. You pay us for the platform and the work."
"What will Meta cost us?"	Point them at Meta's own published platform pricing. Never quote a Meta rate yourself.
The competitive answer	"Meta's agent is a smarter reply. AI Studio is how you run customer conversations — automation, humans, campaigns and your own systems, in one place, under your control."
The price objection answer	Return to their own cost of the status quo, then reduce scope rather than discount price.
The POPIA answer	They are the responsible party; we act as operator. Access, correction and deletion — with suppression rather than erasure where a retention duty applies.
Never promise	A free trial. A green tick without three organic PR mentions. API-driven flows on non-WhatsApp channels. A Meta rate. A discount off the rate card. A go-live date dependent on Meta verification without naming the dependency.
Always do	Use the briefing meeting before quoting. Split the Everlytic line from the client-direct Meta line. Flag open items in-document. Name the dependency next to the date.