



Beta Communication & Invite Pack

Invite, brief and follow up with controlled beta testers without overloading them.

Beta onboarding communication pack

How to use this pack

- Use the beta tester invite for direct business testers.
- Use the agency invite for agency testers.
- Use the follow-up messages during the install and test period.
- Use the expectations document to keep beta focused and stop future ideas becoming blockers.

Controlled beta tester invite

Subject: Invitation to test 247ChatMate

Hi [Name],

I'm inviting a small number of selected businesses to test 247ChatMate before it is released more widely.

247ChatMate is a website lead tool for service businesses. It helps website visitors start a WhatsApp conversation, captures useful enquiry details, sends the business a lead email, and gives a simple weekly summary of website chat activity and saved leads.

This is a controlled beta, not a public launch yet. The product is working, but I want real-world feedback before opening it up properly.

What I'd like you to test

- Can you install and activate the plugin?
- Can you enter your WhatsApp number and leads email?
- Can you choose your business type and check Visitor Buttons?
- Does the widget appear?
- Does WhatsApp open correctly?
- Does the lead email arrive and make sense?
- Does the weekly summary feel useful?

What I need from you

- Report anything that does not work.
- Send screenshots if something looks wrong.
- Tell me what confused you.
- Tell me if the lead email and dashboard feel useful.
- Tell me what would stop you using or paying for this.

When the beta package is ready, I'll send you

- The plugin zip
- The setup checklist
- The issue report template
- The feedback form

Thanks, Adam



247ChatMate

Turn website chats into WhatsApp leads

Agency beta invite

Subject: Agency beta invite for 247ChatMate

Hi [Name],

I'm inviting a small number of agencies to test 247ChatMate before the wider rollout.

247ChatMate is a website lead and WhatsApp conversion tool for service businesses. It helps turn website visitors into WhatsApp conversations, captures useful enquiry details, sends lead emails, and gives the business a simple weekly summary showing website chat activity and saved leads.

You can test it on your own agency website first, then potentially on selected client sites once the beta is stable.

This is a controlled agency beta, not a white-label offer. The product remains 247ChatMate.

Agency test focus

- How easy is it to install?
- Could you set it up for a normal client?
- Would the client understand setup?
- Are visitor buttons suitable for service businesses?
- Does the lead email feel useful?
- Does the weekly summary help prove value?

Agency feedback needed

- Setup friction
- Missing verticals or business types
- Repeated client questions
- Lead email clarity
- Reporting usefulness
- Pricing/bundle feedback
- Would you deploy it to clients?

Package sent when ready

- Plugin zip
- Agency/client setup checklist
- Bug report template
- Agency feedback form
- Priority rules for issues

Thanks, Adam



Follow-up and check-in messages

After sending the beta package

I've sent over the 247ChatMate beta package and setup checklist.

Please start with install, WhatsApp number, leads email, business type, Visitor Buttons and one test lead.

If anything breaks or feels confusing, send me a screenshot and use the bug report format if possible.

After install

Just checking how the 247ChatMate install went.

Did it install without errors? Did the dashboard open? Were WhatsApp number and leads email easy to set?

Did Visitor Buttons make sense?

After first test lead

Once you've sent the first test lead, could you check WhatsApp, lead email arrival, phone number readability and whether the email helps you reply faster?

After one week

You've had 247ChatMate running for about a week now.

Did the widget feel useful? Did any real enquiries come through? Did the weekly summary make sense?

What would need to improve?

Structured feedback request

Could you fill in the short beta feedback form when you get a chance?

The most useful feedback is what was easy, confusing, broken, valuable, missing or a reason not to buy.

If they report a vague issue

Thanks — can you send me a little more detail?

Please include the page, what you clicked, what you expected, what happened instead, browser/device and a screenshot if possible.

Agency follow-up after first client-style test

Could you see yourself setting this up for clients?

Which client type would suit it best? What would clients struggle with? Would the lead email and weekly summary help prove value?



Beta tester expectations

<p>What testers are testing</p> <ul style="list-style-type: none">Install and activationAdmin dashboard claritySetup flowWhatsApp number setupLeads Email setupVisitor Buttons/business typeFrontend widget displayWhatsApp handoffLead emailsWeekly summary email	<p>What is not the focus yet</p> <ul style="list-style-type: none">Perfect spacing on every admin cardAdvanced agency dashboardFull CRM-style lead managementPublic directory pageQR trackingGlobal language packsTelegram/LINE channelsHeavy remote SaaS platform featuresWhite-label agency version
<p>Tester responsibilities</p> <ul style="list-style-type: none">Test honestlyReport bugs clearlySend screenshots where possibleSeparate blockers from nice-to-have ideasTell Adam what would make the product worth paying for	<p>Beta success means</p> <ul style="list-style-type: none">Normal business can install and set it upWidget worksWhatsApp opensLeads are emailedPhone-only leads are savedWeekly summary shows clear valueNo critical blocker appears