WHATSAPP BUSINESS
INFORMATION AND FEEDBACK MECHANISM IN A MIGRATORY CONTEXT

Regional Orientation Guide

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ACRONYMS

API	Application Programming Interface
ATM	Automated Teller Machine
CEA	Community Engagement and Accountability
COVID-19	Coronavirus disease 2019
ERC	Ecuadorean Red Cross
IFRC	International Federation of Red Cross and Red Crescent Societies
IM	Information Management
CTP	Cash Transfer Programme
PC	Personal computer
QR	Quick Response code
SMS	Short Message Service
NS	National Society
NSs	National Societies

1. AIMS OF THIS GUIDE

This guide aims to help the Red Cross and Red Crescent National Societies (NSs) to set up and manage an information and community feedback systematic mechanism using the WhatsApp Business app. It is focused on migration programmes, but it can also be tailored to other contexts.

The orientation provided is based on the experiences of some Latin American countries with the use of this mechanism during the COVID-19 pandemic response. The pandemic situation has brought the use of digital tools to communicate with the communities.

This guide provides orientation and tools to design and implement feedback cycles that can maintain a continuous and real time dataflow to inform daily decision-making. This helps to carry out a better people-centred programming of our operations, considering the opinions of our target population and including them in the decision-making process to address their direct needs. At the end of this document, you will find a toolkit that will help you set up the WhatsApp line.

The content of this guide will be reviewed and updated regularly on the basis of new knowledge and the progress in the implementation of the WhatsApp line.

2. THE MIGRATORY CONTEXT IN THE REGION AND INFORMATION AND COMMUNICATION NEEDS

Currently the Bolivarian Republic of Venezuela (Venezuela) has one of the biggest displaced population groups in the world[1]. Towards the end of 2018, around 3 million Venezuelans had left the country for diverse reasons, such as violence, persecution, and the economic and political crisis[2].

Venezuelan migration has drastically transformed the migratory scenario in Latin America. Even though the main countries of destination of Venezuelan migrants (Colombia, Peru, and Ecuador) share the same language and religion, factors such as cultural diversity and the historical structure of discrimination and inequality in the region make their integration even more complex. Furthermore, these countries have little or nonexistence experience in dealing with migrant population and have structural problems such as informality, centralization, and lack of employment, education, and health public policies[3].

Additionally, a significant number of this migrant population is extremely vulnerable. They are undocumented persons, due to several factors, including administrative procedures and restrictions, long waiting periods and high application fees. Venezuelan migrants are vulnerable to several forms of exploitation, abuse, violence, human trafficking, and they may turn to negative ways to make a living in order to survive[4].

The high level of mobility and the scale of the migratory flow in recent years have helped us to make profiles of the Venezuelan migrant population in Latin America and the Caribbean. One group of migrants are willing to settle with more than 6 months living in the host country[5]; another group of migrants carry out their activities in one country but return to their country of origin on the same day; and a third group consists of in-transit migrants, they spend some days in a country before entering their country of destination[6].

According to the 'Estudio Regional de la Plataforma Regional de Coordinación Interagencial para personas Refugiadas y Migrantes de Venezuela sobre las necesidades de información y comunicación', most migrants have access to information via cell phones (76% of migrants own a smartphone)[7]. They use mainly messaging apps and social networks such as WhatsApp and Facebook to keep in touch with their family and friends and to search for information[8]. The results of this study, led by UNHCR and IFRC, were key to define

[1] UNHCR ACNUR. (2019). Refugiados y migrantes de Venezuela superan los cuatro millones: UNHCR and IOM. https://www.acnur.org/noticias/press/2019/6/5cfa5eb64/refugiados-y-migrantes-de-venezuela-superan-los-cuatro-millones-acnur-y.html%23_ga=2.174044003.1710861379.1572814963-812802582.1572814963

[2] International Organization for Migration. (2019). World Migration Report 2020. https://publications.iom.int/books/world-migration-report-2020

[3] Blouin, C. (Coord.). (2019). Estudio sobre el perfil socio económico de la población venezolana y sus comunidades de acogida: una mirada hacia la inclusión, Lima: Instituto de Democracia y Derechos Humanos de la Pontificia Universidad Católica del Perú y PADF.

[4] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC. https://r4v.info/es/documents/details/73684

[5] IFRC. (2020). WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana.

[6] World Bank (2018). Migración desde Venezuela a Colombia: impactos y estrategia de respuesta en el corto y mediano plazo. Banco Internacional de Reconstrucción y Fomento.

[7] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC https://r4v.info/es/documents/details/73684. More than 3,400 Venezuelan refugees and migrants took part in this evaluation, as well as refugees and migrants from other nationalities, host communities and key informants.

[8] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC. https://r4v.info/es/documents/details/73684
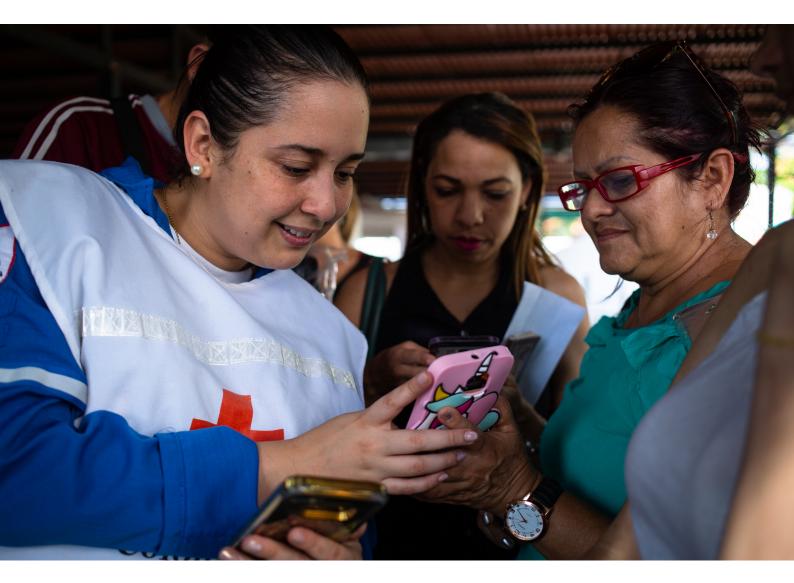
the use of WhatsApp instead of the Virtual Volunteer app. Another interesting finding was that face-to-face communication is one of the most trusted sources of information, particularly for in-transit migrants who usually do not have a mobile phone or access to Internet. Many migrants feel they do not have access to information. Their information needs are urgent and revolve around the access to rights and legal procedures, where to get assistance, access to employment and livelihood opportunities, health, and education, among many others[9].

[9] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC. https://r4v.info/es/documents/details/73684

3. INFORMATION AND FEEDBACK MECHANISMS TO ASSIST MIGRANT POPULATION

Information and feedback mechanisms are key to carry out community interventions, including the assistance to migrant population. These mechanisms help to establish effective two-way communication channels in order to listen to community voices and learn about their needs, demands and preferences in humanitarian assistance, and also to ensure they have timely information about their rights and the assistance available. Likewise, the information collected is key to plan a more effective implementation of the humanitarian response[10].

The practice of establishing two-way communication is an essential form of service and empowerment to the people since it enables humanitarian organizations to build a trusting relationship with the affected population and put people at the centre of the response, giving them a leading role to communicate their needs, priorities, and preferences. This type of communication also enables the target population to receive timely and life-saving information via their preferred communication channels, which are key tools in times of social distancing.

In the current health emergency, messaging apps such as WhatsApp become innovative and far-reaching communication tools: not only do they assist migrant population achieving the mechanism's own aims, but they also offer unique features to optimise their own procedures.

[10] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC. https://r4v.info/es/documents/details/73684

4. WHATSAPP BUSINESS: AN INNOVATIVE AND USEFUL OPTIONL

WhatsApp is a free to install instant messaging app for smartphones that lets users send and receive messages through Internet. It is easy to download, install and use on various platforms, including Android and iOS in a smartphone[11]. In recent years, the company launched WhatsApp Business, which is an identical version of the original, but it is aimed at connecting organizations with their clients.

With this tool we can create a short profile of our organization (description, email address, mailing address, working hours and website.) It also provides smart messaging tools (greetings, fast answers and auto reply messages), status and catalogues where we can show graphics with relevant messages and services provided by the organization, and messaging metrics (statistics that illustrate the relation between sent, delivered, and read messages). Additionally, it lets us create contact lists of up to 256 contacts, provided that both the administrators and the users have saved their contact phone numbers in their cell phone's address book. The account can only be used in one cell phone at a time, but once it has been configured, it can be opened in a computer or laptop using the cell phone QR code. You only need Internet, a smartphone, a SIM card, and a computer/laptop to open the app in any web browser[12].

During the COVID-19 health emergency and due to the social distancing restrictions, several NSs have used the WhatsApp Business free version with their target migrant population as a two-way communication mechanism. These experiences have not only shown the usefulness of this tool, but also its flexibility in the face of the various challenges during its implementation. This has proven great advantages such as the two-way communication between the organization and the target audience; the possibility of generating dialogues using several formats, such as text, photos, audios, and phone calls (using the app or the cell phone data without an Internet connection); and the possibility of using complementary apps such as WhatsAuto, which replace the operator's role with a *chatbot* or programme that imitates human interaction sending automatic replies.

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[11] It is recommended to review the WhatsApp Business Terms of Service before its installation. WhatsApp. (2020). WhatsApp Business App. https://www.whatsapp.com/business/.

[12] Facebook. (September, 2020a). Connecting with your customers on WhatsApp starts here. https://www.facebook.com/business/whatsapp/get-started

REMEMBER

WhatsApp Business has a paid version called API, which requires a telephone number prior to the use of the app, as well as an authorized provider linked to WhatsApp and, in most cases, an external server. With this paid version you can send unlimited programmed messages previously validated in WhatsApp and you can operate the line using countless users and platforms[13]. As for the free version, the line can only be used on two platforms (cell phone and PC/laptop).

EXPANDING WHATSAPP BUSINESS SERVICES: THE CASE OF THE ERC

During 2020, the Ecuadorean Red Cross (ERC) implemented WhatsApp Business for their Cash Transfer Programme (CTP) during the COVID-19 pandemic. They use the complementary WhatsAuto app to include a chatbot in the line. WhatsAuto enhanced the advantages of WhatsApp by reducing the line operator's working hours and increasing the speed of the response to the questions asked by the users (migrant population).

STEPS TO BUILD A PROFILE IN THE WHATSAPP BUSINESS APP[14]

- Download the app free of charge from the Android or the iOS store.
- Install the app and verify your phone number; it can be a cell phone number (you will receive a message or a phone call) or a telephone number (you will receive a phone call).
- Configure your profile: upload a photo (it can be a logo), enter the name, category, and description of the organization. You can also add the commercial address, working hours, website, and email address.
- Configure the greetings, fast answers and auto reply messages, or a catalogue of relevant images that you want to share with the users.
- Share your profile link or QR code with your target audience.
- Monitor statistics.

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[13] Facebook for developers. (september, 2020). WhatsApp FAQ https://developers.facebook.com/docs/whatsapp/faq
[14] FACEBOOK. (2020, 15 de julio). *How to download your WhatsApp Business App.* https://bit.ly/3eJoQP6; WHATSAPP. (15 July 2020). *Aplicación WhatsApp Business.* https://bit.ly/2Bj9cMA

5. KEY ACTIONS TO IMPLEMENT A WHATSAPP BUSINESS LINE*

In this section we will explain the activities that NSs need to carry out when they are considering implementing the tool.
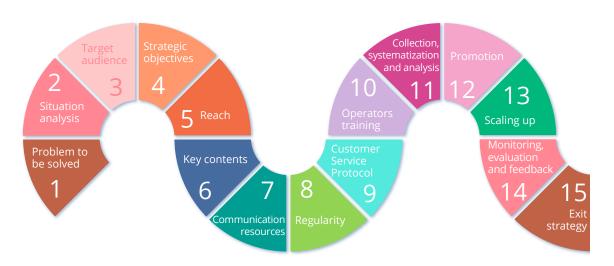
FIGURE 1. KEY ACTIONS TO IMPLEMENT A WHATSAPP BUSINESS LINE

Source: Prepared by the author

*At the end of this document you will find the key tools used for developing each key action.

a. Identifying and defining the problem to be solved

Firstly, we need to analyse and determine the needs of the programme(s) or the emergency operation, and the problem(s) that we are trying to solve within our target population. We also need to evaluate how CEA strategies may help to achieve our aim and the role that an information and feedback mechanism will play in this process. The process of implementing the tool must be incorporated into the development of the programme/ emergency operation based on available evidence. At this moment, it is essential to clearly define the population that is being affected by the problems we have identified. This will be the target audience we will be working with.

b. Evaluating the feasibility and relevance of using the tool

Once the problem has been identified, we evaluate the feasibility and the relevance of using the tool.

As a first step, at the assessment phase in the field, we need to verify that all potential users have the means to access the tool: a cell phone with Internet access and the WhatsApp app downloaded in their cell phones. We can also review secondary sources of information to learn about whether the target audience is using WhatsApp and the level of trust they have in this app. This information will confirm that the target audience is able to use the tool. Likewise, we should keep in mind that we need to develop complementary strategies

on a permanent basis so we can reach the whole of our audience. Fortunately, WhatsApp can also reach those users that do not have Internet access, through phone calls or SMS. However, we need to monitor the process closely to ensure that no one is left behind.

CONSULTING SECONDARY SOURCES OF INFORMATION: THE CASE OF THE IFRC ANDEAN CLUSTER

In March 2020, the IFRC Andean Cluster Office in Peru implemented the COVID-19/Migration WhatsApp Business line. During the assessment process, The IFRC use the 'Evaluación regional de necesidades de información y comunicación'[15] study conducted by R4V to learn whether their target audience (Venezuelan migrants in Peru) had the necessary means to access the line. Additionally, the IFRC revised the Hootsuite (2019)[16] annual report that reveals that WhatsApp is the more popular messaging app in Peru.[17]

REMEMBER

It is important to identify whether the phone number of the person being assisted is his/her own or is a community phone (shared by several people). This will help us to develop specific procedures for collecting and delivering information from the beginning of the planning process.

As a second step, we need to evaluate the capacity of the Red Cross National Society in terms of availability of information and human resources for the effectiveness of the operation.

The next table shows some of the basic and complementary requirements that can help us to assess if we have enough resources to implement the tool. It is essential that there is a good Internet access within the country, since the target population need to connect to Internet. Another requirement consists in the necessary resources to operate the line from the National Society: a smartphone (with a SIM card) and a computer.

It is also important to estimate how many people will be working in managing and operating the line. This is key to define the type of interaction we will have with our target audience.

Table 1 shows that it is recommended to hire one full-time person (to operate the line, record the data and promote the line), but it is advisable to either have more operators or configure a system for delivering messages (chatbot) that can provide an immediate an effective reply.

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[15] Plataforma Regional de Coordinación Interagencial para Refugiados y Migrantes de Venezuela. (2019). Evaluación regional de necesidades de información y comunicación. UNHCR-IFRC. https://r4v.info/es/documents/details/73684
[16] Hootsuite. (15 July 2020). *The global state of digital in 2019.* https://bit.ly/2CAvp9B
[17] The Hootsuit annual report provides information on the use of social networks, ecommerce, and mobile devices around the world. The 2020 report can be seen in this link: https://wearesocial.com/digital-2020

TABLE 1. REQUIREMENTS CHECKLIST

Requirements	Needed	Preferred
External		
Good Internet connection	✓	
Material resources		
NS with Internet access and good connection	✓	
Equipment: smartphone and computer (1 smartphone and 1 computer for each line operator).	✓	
Human resources		
A full-time person to operate the line (answering messages, recording data, and promoting the line).	✓	
One or two operators to give support to the line if needed.		✓
Technical (medical) staff: for medical orientation if needed.		✓
Skills to run the line in different languages (according to the context and keeping in mind the principle of not leaving anyone behind).	✓	
Instruments		
Key message bank (you can contact the IFRC in this matter and add tailored messages according to the context).	✓	
Existing feedback system. (The model included in the 'WhatsApp Information Line on COVID-19' can also be used).	✓	
Budget		
Budget for a data plan, a cell phone and a laptop/PC computer.	✓	
Budget for sustainability: resources for hiring more staff, improving technology, and adapting contents.		✓

Source: 'WhatsApp Information Line on COVID-19' and case studies in Peru and Ecuador.

If we are planning to hire staff to operate the line, we need to establish the job profile (roles and responsibilities) according to the areas to be covered, the capacity to cope with the demand, and the projections for expanding the operation. The priority should always be to deliver quality and timely assistance responding to the users' needs.

If it is not possible to hire operators due to lack of time, resources or qualifications, a chatbot can be a partial solution. We should remember that the users value the answer to their needs, and this cannot always be an automatic reply. A chatbot requires an initial configuration that consists in programming the answers given to the user, and it needs a

constant update to meet the users' needs. There are some free apps ready to insert the messages, which reduce the time and experience in the programming[18].

Finally, we need to set the budget for the mechanism. Table 2 shows a basic investing amount to prepare a realistic budget. Likewise, we should prepare a schedule including the frequency of every activity and the time needed to prepare and carry out such activities[19].

TABLE 2. BASIC YEARLY BUDGET

Costs	USD
Data plan	1000
Equipment (cell phones, SIM card, laptops)	2500
Adds in social media or other media	1500
Staff (2 operators and 1 coordinator) *	Variable
Creation and/or adaptation of communication materials	2000
TOTAL	**7000**

Source: WhatsApp Information Line on COVID-19 and case studies in Peru and Ecuador*. Costs may vary depending on the NS's decision, that is, if the NS hires staff or works with existing staff or trained volunteers.

We must warn that operating the WhatsApp line affects the reputation of the organization. For this reason, it is essential to closely analyse all the previous steps to ensure an optimal performance. If the organization cannot meet the minimal requirements, they should not implement the mechanism; they should either search for funding or wait until the requirements are met. In addition, it is recommended to implement a strategy to protect the reputation of the organization during the use of the tool. The development of a contingency plan to address negative situations such as the absence of the WhatsApp line operator or a network crash, among others, can help to protect the NS reputation and ensure the effectiveness of the line.

REMEMBER

The CEA approach aims to include those people in risk of being excluded. We should identify all the possible risks to avoid leaving people behind. For example, a risk identified by the IFRC and the ERC was that some people did not have access to Internet; therefore, they used SMS and phone calls to respond to and get in touch with their target audience. We must use a tool that has no limitations for interacting with our target audience. It is essential to keep in mind that the CEA strategy must consider all relevant means to facilitate information processes and the dialog with communities; WhatsApp is an important tool, but it is not the only one.

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[18] It is recommended to see the case study in Ecuador: WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana.
[19] International Federation of Red Cross and Red Crescent Societies. (2016). A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do. ICRC. http://media.ifrc.org/ifrc/wp-content/uploads/sites/5/2017/12/IFRC-CEA-GUIDE-0612-LR.pdf

NUMBER OF ENQUIRIES PER NUMBER OF OPERATORS

During the first two weeks, the Peruvian COVID-19 WhatsApp line received around 26 messages every day with two full-time operators[20].

The Ecuadorean CTP WhatsApp line received an average of 190 messages per day, and 18 phone calls through the app and the helpline[21]. The line was operated by one person and one chatbot.

c. Defining the target group, the strategic objectives and their scope

The target population or group will be the one that is directly affected by the problems we have identified and are trying to solve. We need to define accurately and clearly who will be the recipient of the tool and understand their information needs and their expectations about the services we are providing. This is key to provide an effective response.

Then, it is essential to define the objective(s) of the tool and what we expect to achieve by its implementation. Table 3 shows some of the objectives that can be set to meet the programme specific needs. The strategic objectives should be clear and concise, easy to measure, realistic and reachable.

TABLE 3. **WHATSAPP TOOL STRATEGIC OBJECTIVES ACCORDING TO THE NEEDS OF THE PROGRAMME**

Needs of the programme	Objective of the feedback mechanism	Example
To improve community engagement and feedback	The tool will focus on providing engagement and listening opportunities and responding to and acting on the feedback immediately.	Ecuadorean case: Cash Transfer Programme (CTP). The WhatsApp line was the means to immediately solve enquiries and complaints about the CTP, and address rumours.
To provide guiding information	The tool will focus on providing relevant, timely, actionable, and life-saving information in a fast, effective, and large-scale manner.	Peruvian case: The WhatsApp line was implemented in a context where official information channels were scarce. Its aim was to provide relevant, timely and life-saving information at the onset of the pandemic.

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20 International Federation of Red Cross and Red Crescent Societies. (2020e). WhatsApp Information Line on COVID-19. Results of the first two weeks (01-14 May 2020). IFRC.
21 Ecuadorean Red Cross (2020). Community Engagement. 'Programa de Transferencias Monetarias (PTM) para población en situación de movilidad humana y comunidades de acogida'.

Needs of the programme	Objective of the feedback mechanism	Example
Social and behaviour change communication	The tool will be aimed at encouraging communities to adopt beneficial practices.	The tool can help to promote prevention and protection behaviours regarding key issues such as health, water and sanitation, prevention of gender-based violence, etc.
To plan evidence-based advocacy actions	The tool will foster community engagement to empower people to take action and communicate their needs to decision-makers.	Daily or weekly information provided by the interaction with the users is key to have a better understanding of the migrant population. Not only can this be useful for NSs, but also for the different actors working in the response to migration within the area. This process will need advocacy actions.

Source: Prepared by the author. International Federation of Red Cross and Red Crescent Societies. (2016). A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do. International Federation of Red Cross and Red Crescent Societies http://media.ifrc.org/ifrc/wp-content/uploads/sites/5/2017/12/IFRC-CEA-GUIDE-0612-LR.pdf

Finally, we need to define which type of interactions will be performed with the tool, that is, whether we will reach our target audience via group chats or broadcast lists, individual and tailored chats, a chatbot, or combining different options.

MEXICO ICRC CASE - BROADCAST LIST WITHOUT COLLECTING PERSONAL DATA

The WhatsApp Business app implemented by the International Committee of the Red Cross (ICRC) in Mexico is a one-way communication tool. Its aim is to share information sending self-care messages to the migrant population through a list of key partners or 're-editors'[22], including shelter coordinators, focal points, consulates, organizations, agencies, and institutions that work directly with migrants. In turn these partner institutions disseminate those messages and communication materials among the migrants they have contact with. Additionally, these communication materials (also found in the ICRC webpage) indicate the phone number of the WhatsApp line, inviting migrants to save the number and contact the line to receive the self-care messages. When migrants contact the line, they receive the self-care messages, and if they have other enquiries, they receive a message with the ICRC's phone number and website address. The aim is to keep the WhatsApp line as a one-way information and communication mechanism.

This WhatsApp line was promoted via Facebook adds and posters in relevant assistance points, inviting the migrant population to contact the line. Likewise, a group of co-editors worked in the process of sharing the phone number with migrant networks and became key actors for the well-functioning of the tool.

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[22] Re-editors are persons or institutions with a captive audience. Obregon, R., Rodrígues, C., & Vega, J. (2002). Estrategias de Comunicación para el Cambio Social. Friedrich-Ebert-Stiftung (FES).

IFRC PERU CASE – BROADCAST LIST WITH CONSENT FOR USING PERSONAL DATA

The IFRC Andean Cluster Office in Peru (IFRC Peru) decided to keep constant and customised communication with the migrant population in Peru by integrating a broadcast list to the COVID-19 and the CTP WhatsApp lines. The migrants who were willing to be included in the broadcast list gave their informed consent.

Informed Consent
The users of the COVID-19 WhatsApp line received the following message: 'The Red Cross will deliver specific information for population in human mobility. Would you like to be added to this group to receive information? YES / NO'. If the person was interested in receiving more information, he/she received the following message: 'You will receive information on health, healthy living, first aid, and other type of information aimed at the population in human mobility'.

The population that was participating in the Cash Transfer Programme was automatically registered in the Broadcast List, since the commitment to take part in the Programme includes the consent to receive information from IFRC Peru.

Data Protection
The user's data (such as full name, gender, age, location, phone number, and any relevant information) is confidentially registered and can only be processed by three persons (the line operators) in an Excel file which is the Feedback Log Sheet where all the interactions with the users via the WhatsApp line are recorded.

Additionally, every user is identified with a code that includes the year, the country, and a correlative number (i.e. 20PE01). The user's cell phone number is saved by the operator in his/her cell phone using this code.

Content Creation
Contents are managed using social media grids (Teams or Smartsheet) to be sent three times a week on the basis of the most interesting topics of information for the migrant population. These information needs were identified using a virtual survey sent to the users via WhatsApp.

d. Creating and validating key contents and communication resources, and scheduling messages to be sent

Once we are clear about our target audience and our tool strategic objectives, we need a FAQ database and a key message bank to deliver the information we need to communicate and achieve our goals. We will be answering enquiries, but we will also be able to send messages we are interested in communicating. In both cases, contents must be short, clear, and culturally appropriate. Both data banks can be regularly updated based on the progress of the tool implementation.

Remember that when we identify the problem, we also need to identify the information needs of our target audience. To have a deep understanding of these needs, we can review documents with previous experiences aimed at the same target population[23] and collect feedback and doubts or suitable messages. Likewise, we can contact our target group and asked them about their needs and/or interests regarding the topic(s) that will be covered in the WhasApp line[24]. We can also ask partner organizations working with migrant population within the area about the migrants' information needs.

Just as important as the message bank and the FAQ database is the preparation of a set of communication materials (graphics, audios, videos) that will support the answers to certain questions as well as the key messages we want to communicate. This way the operator will have these resources on hand to use them when necessary.

Validating these materials and messages is a key step to ensure they will be understood, accepted, and valued by the target audience. It is important to contact some members of the target group or, at least, some local volunteers to know their opinion and make the necessary adjustments in coordination with the Communications department.

Once we have verified our messages are ready to be disseminated, we can prepare an illustrative document to guide the work of the WhatsApp line operators and inform them about how to use the message bank and the FAQ database.

Determining when to send messages, that is, setting a strategic posting schedule is an important activity we should carry out in advance. Posting regular content is essential but we need to avoid sending too many messages.

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[23] International Federation of Red Cross and Red Crescent Societies. (2016). A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do. International Federation of Red Cross and Red Crescent Societies http://media.ifrc.org/ifrc/wp-content/uploads/sites/5/2017/12/IFRC-CEA-GUIDE-0612-LR.pdf
[24] See 'IFRC Peru case – Broadcast List with consent for using personal data'.

> **REMEMBER**
>
> Preparing and updating a message bank and a FAQ database, as well as a set of communication materials, is a key activity before launching the WhatsApp line. This information should be updated regularly.[25]

> **BRANDING THROUGH WHATSAPP BUSINESS CATALOGUES**
>
> WhatsApp Business allows the display of images uploaded in its catalogue located in the profile of the organization. This enables the NS to post relevant communication materials for the target audience that will help to position the NS, its programmes and the WhatsApp line.

e. Establishing customer service protocols and training operators

Designing customer service protocols to ensure an effective operation of the line will help us to manage all the interactions with the users in a professional and confidential manner, protecting their personal data and standardising the response to these interactions[26]. Protocols are important for systematizing processes, minimizing errors, and saving time in the operators training. They provide a guide to customer service and can be updated when necessary.

Customer Service Protocol

A customer service protocol clearly defines the steps to be followed by the operators or the chatbot regarding the interaction with our target audience, including how to access the tool, data protection policies, how to respond to sensitive information[27], greetings, the style of communication, maximum waiting time, recording interactions, handling difficult interactions, and closing interactions.

We should also include general guidelines to foster responsible data management, prioritizing anonymity and deleting any unnecessary personal data[28]. It is essential to guarantee the safety, dignity and privacy of those people who are requesting information or providing feedback about our services[29].

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[25] See the experience in Ecuador: International Federation of Red Cross and Red Crescent Societies. (2020a). WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana. Cruz Roja Ecuatoriana y la experiencia de Perú: International Federation of Red Cross and Red Crescent Societies. (2020a). Línea WhatsApp Business COVID-19/ Migración. Case study. IFRC.

[26] International Federation of Red Cross and Red Crescent Societies. (2020c). WhatsApp Information Line on COVID-19 Toolkit.

[27] Sensitive information is information related to sexual exploitation and abuse, corruption, extortion and/or fraud, violation of the code of conduct and sexual or gender-based violence. International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

[28] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

[29] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

Other protocols should also be considered, for example, a referral of a person needing psychosocial support. These protocols should include internal flow charts previously coordinated and validated by the areas involved as well as the pathway to be followed[30]. Additionally, internal WhatsApp chat groups with a defined and clear purpose can also be used, involving relevant staff in key areas[31].

Data Protection Protocol

Personal data is any information that relates to an individual and can lead to the identification[32] of a particular person or data subject[33]. Protecting personal data is key to guarantee the safety, dignity and privacy of those people sharing information and feedback with us. Data protection also builds trust[34]. While using the tool, we will request and collect personal data from the target population. Therefore, we must consider establishing some data privacy protocols in addition to complying with IFRC policies:

Defining the personal data to be requested from the users: One essential piece of data for the tool is the cell phone number; it must not be saved in the cell phone or be viewed by unauthorized persons. While storing the feedback from the target population, we will identify each interaction with a code that will be different from the user's cell phone number.

Likewise, we must avoid forming WhatsApp groups with our users because their personal data (phone number, profile picture, status, etc.) will be revealed to other members. If we need to collect any other data, such as the gender or the location of a person, this will be evaluated jointly with the Data Controller (the person who determines the purposes and means of processing personal data)[35]; however, we will ensure to keep the basic personal data to accomplish the objectives of the WhatsApp line.

Guidelines for requesting consent: We must define the time and manner for requesting consent from the users to record their personal data. It is recommended to request it at the end of the interaction, that is, after the service has been provided, so it will not be perceived as a determining factor. Additionally, we should let the person know that it is not necessary

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[30] See the experience in Ecuador: International Federation of Red Cross and Red Crescent Societies. (2020a). WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana.

[31] See the experience in Peru: International Federation of Red Cross and Red Crescent Societies. (2020a). Línea WhatsApp Business COVID-19/Migración. Case study. IFRC.

[32] This may include an identifier such as a name or audiovisual materials, an identification number, location data or an online identifier; it may also include information that is linked specifically to the physical, physiological, genetic, mental, economic, cultural or social identity of a data subject. International Committee of the Red Cross (2020). ICRC Rules on Personal Data Protection. ICRC. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf

[33] A data subject means a natural person (i.e. an individual) who can be identified, directly or indirectly, in particular by reference to personal data. International Committee of the Red Cross (2020). ICRC Rules on Personal Data Protection.

[34] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

[35] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf

to give an affirmative answer, and we should offer other options such as 'no response/do not know'. Therefore, we need to have a reference script for requesting consent. It is also essential that the team involved (particularly the operators) fully understand that consent is paramount for collecting personal information. Consent is defined as any freely given, specific and informed indication of the data subject's wishes by which he or she agrees to the processing of personal data relating to him or her. This involves communicating in an easy-to-understand manner and in their language how the data will be processed and used[36].

Verifying the accuracy of the data: We must take measures to ensure personal data is accurate and up to date. Mistakes or inaccuracies in personal data must be corrected or deleted as soon as possible[37].

Safeguarding personal data: During the processing of feedback, the data must be anonymized. Once the data has been entered, we must delete it from the tool. We must also protect the data that has been stored in computers, laptops, cell phones and in the WhatsApp account to prevent unauthorized access[38].

Establishing a minimum retention period: In coordination with the involved areas, we must design an assessment process to identify that the personal data is still useful for humanitarian assistance or for the purposes for which it was collected. When retention of personal data is no longer necessary, all records and backups must be securely destroyed[39].

Forming a specific team to access the data: This team must consist of staff specifically trained in data protection and processing of sensitive feedback. Members of the team must be discreet and have impeccable behaviour[40].

Protocol for managing sensitive information

Through the WhatsApp line we may receive sensitive information reporting cases of sexual exploitation and abuse, corruption, extortion and/or fraud, violation of the code of conduct and sexual or gender-based violence[41], against IFRC staff or an external agent. Some guidelines have been established to help develop protocols for handling sensitive information, in addition to complying with IFRC policies:

Defining a referral pathway to report sensitive information: A basic protection service mapping must be done to understand where we can refer protection cases to. In the event a member of Red Cross staff is alleged to be involved in bad practices, we must establish an internal procedure, in coordination with the Office of Internal Audit and Investigations and Human Resources[42].

Determining the data that will be requested: We must define which sensitive data will be collected and how we will process sensitive information in our database[43].

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[36] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf
[37] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf
[38] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf
[39] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf
[40] International Committee of the Red Cross (2020). ICRC rules on personal data protection. https://reliefweb.int/sites/reliefweb.int/files/resources/4457_002_GUIDELINES_DELEGATIONS_ENGAGEMENT_RESTRICTIVE_MEASURES_WEB_1.pdf
[41] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/
[42] Tinde, T. (2018). IFRC Secretariat Policy on Prevention and Response to Sexual Exploitation and Abuse. Version number: 1.0.
[43] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

Offering a safe and protected space: We must ensure that the WhatsApp line is safe for the users reporting sensitive information, and that it offers protection against any retaliation[44].

Prevention of Sexual Exploitation and Abuse (SEA): It is important to strengthen our internal systems to report, investigate and monitor possible breaches of the code of conduct and staff regulations, especially those relating to sexual exploitation and abuse[45].

Protocol for recording and managing data

Daily information will be generated by the interactions with the users of the WhatsApp line. The proper recording of this information and its subsequent analysis for decision-making also requires a clear protocol. Details on this matter can be found in the point "f" of this guide.

Protocol for feeding and managing the message bank and the FAQ database

It is essential to update the bank and the database on a regular basis. This requires a clear protocol to define the update frequency, who will oversee this process, and which areas of the organization should be coordinated to ensure updates are technical relevant and validated.

Operators training

The operators of the WhatsApp line are key actors since they will be ones interacting with the users. They must not only receive training in the use and management of the tool, but also in data protection, privacy, and consent, which are priority issues in data collection and the operation of the line[46].

Operators must also be familiar with the Red Cross values. The practical training is as important as the training in institutional values. This will enable operators to gain a better understanding of their role and the quality they must offer in every interaction with the users[47]. It is recommended to develop a basic operator training package for capacity building in terms of addressing child protection, prevention of sexual abuse and harassment, and gender perspective, among other issues.

These trainings must be provided on a regular basis if the WhatsApp line will be implemented during a long period of time. This will ensure that the protocols will be applied.

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[44] Tinde, T. (2018). IFRC Secretariat Policy on Prevention and Response to Sexual Exploitation and Abuse. Version number: 1.0.
[45] Tinde, T. (2018). IFRC Secretariat Policy on Prevention and Response to Sexual Exploitation and Abuse. Version number: 1.0.
[46] International Federation of Red Cross and Red Crescent Societies. (2016). *A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do.* International Committee of the Red Cross. http://media.ifrc.org/ifrc/wp-content/uploads/sites/5/2017/12/IFRC-CEA-GUIDE-0612-LR.pdf
[47] International Federation of Red Cross and Red Crescent Societies. (2020c). WhatsApp Information Line on COVID-19 Toolkit. IFRC.

PROTOCOLOS PARA APS: EL CASO DE LA IFRC OFICINA DE PAÍSES ANDINOS

Due to the high number of enquiries relating to psychosocial support (PSS), the IFRC established specific protocols for operators to be able to manage emotional first aid, recognize complex cases and refer cases to other services of the organization.

f. Defining data collection, systematization and analysis mechanisms to promote decision-making

Recording the information given by the users is essential to ensure effective decision-making processes. We can use a spreadsheet with an integrated dashboard that allows immediate data visualization and update. We recommend the template of the 'WhatsApp Information Line on COVID-19'. (See a feedback log sheet of the Peru case in the 'Tools' section). This will enable to record the data in a simple and standard format that offers real-time views and can be used by all NSs.

As we mentioned before, it is important to create a protocol for completing the feedback log sheet, taking into account the purposes of recording the data, how each interaction must be registered in real-time and the compliance with national laws and rules on personal data protection established by the NS and the IFRC. For instance, we can assign a code to each new chat and group the collected data in a cell (date, name of the person collecting the data, user's private data, issues addressed, type of information provided, user's enquiries or information needs, and if the chat has been closed, that is, if the final appreciation message has been delivered and the personal data has been collected).

As for the systematization and analysis of information, we must define the roles and responsibilities of the areas involved within the NS. The best option is to use flow charts previously agreed between these areas. In these flow charts we will outline the internal pathway we will follow to share the reports and support the decision-making process. This will ensure that every piece of information we are collecting from the interactions with the users will be shared with the programmes involved and that timely decisions will be made.

COMPLETING THE LOG SHEET ON A REGULAR BASIS: ERC AND IFRC PERU CASES

The IFRC established a daily recording of feedback at the end of each operator's shift. The ERC had only one operator who recorded the information every Sunday; it was the day when he/she received less enquiries from the users. In both cases, the information was timely monitored and analysed which enabled effective decision-making during the line operation[48].

g. Designing and implementing a promotion plan

This step is key to ensure the positioning of the tool among the target population and that it will be widely used by our target audience.

Firstly, we must formulate precise and feasible communication objectives by identifying what we want to achieve with the promotion plan, considering the tool strategic objectives and the target audience. Then we need to set a budget for promoting the tool and engage the staff that will be working in the design and implementation of the promotion plan. This must be coordinated with the NS communication units.

It is important to ensure that we will use the most popular communication channels among the target population to reach as many users as possible. For instance, the preferred channels of the migrant population are social media platforms. Some strategic promotion actions include media interviews with institutional spokespersons, promotion messages in social media, flyers, engaging influencers, etc. It is key that these actions are included in a work plan in two categories: those aimed at promoting the launching of the WhatsApp line and those aimed at promoting the line once it has been implemented.

h. Implementing a pilot to be scaled-up

The implementation of the tool should be tested within a delimited area and a narrowed-down topic. The aim is to test the overall performance of the WhatsApp line, including protocols, management of interactions, initial reactions of the target audience, pathways for data collection and analysis, etc. This will help us to enhance the performance of the line by solving any problems from the start and incorporating new learnings. The length of the implementation of this pilot line before scaling up will be defined by each NS. In the ERC case, which consisted in a tool to support the CTP, the WhatsApp was only implemented for one month. The pilot was developed on the go during the first week of the implementation

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48 See the experience in Ecuador: International Federation of Red Cross and Red Crescent Societies. (2020a). WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana. Cruz Roja Ecuatoriana y la experiencia de Perú: International Federation of Red Cross and Red Crescent Societies. (2020a). Línea WhatsApp Business COVID-19/ Migración. Case study. IFRC.

where they could check if it was working as expected and make the necessary changes for an effective performance of the line.

i. Monitoring and evaluating the results to improve the service

Monitoring the WhatsApp line performance is key to ensure the success of the tool. This can be carried out on a daily or weekly basis and must be documented in an executive report based on the main enquiries, new information needs, complex interactions, difficulties experienced by the operators or by using the tool, etc.

The monitoring executive report must provide a clear idea of the progress of the line:

- Number of users disaggregated by gender
- Number of closed interactions
- Type of feedback (question, complaint, comment, suggestion, appreciation, etc.)
- Number and type of new questions
- Number and type of questions that were not answered or had a long answering time
- Number of complaints about the NS services
- Number of users satisfied with the interaction
- Etc.

The report must be prepared in a short period of time and immediately shared with the NS areas described in the protocol to make decisions based on this information. These decisions must also be recorded for further evaluation of how we responded to the users' demands.

The satisfaction level of the users will depend on the topics being addressed. For instance, if the line has a captive audience and users will be closely interacting during a specific period (i.e. a month), such as in the CTP WhatsApp line, a satisfaction survey might be conducted at the end of the process, that is, when the programme has concluded and all users have been able to use the service.

Likewise, a short satisfaction survey may be conducted after each interaction with a user. This will provide us with information about his/her level of satisfaction regarding the quality of the information received, and we will be able to answer any doubts he/she may have. We can also take this opportunity to ask users whether they would agree to provide their personal data, explaining that it will be included in the organization's broadcast lists and they will receive information on topics of interest. In addition, we can learn which information they would like to receive, and which are their preferred communication channels.

The evaluation of results will depend on how long the line will be active. Even though monitoring the line on a daily or weekly basis provides key information and helps to make timely decisions to improve the provision of services, it is essential to conduct both a mid-term evaluation and a final evaluation after closing the line. This will allow us to measure the results and to know whether we have achieved our aims.

In this sense, it is useful to document the experience as a case study that can be shared with other NSs.

THE RIGHT TIME FOR DECISION-MAKING: THE ERC CASE

The ERC conducted a first analysis to assess the tool performance on the first week of its implementation. This initial assessment showed that the WhatsApp line was an effective two-way communication and feedback tool; however, it also revealed that some frequent questions could be answered automatically by a chatbot that could also generate statistical reports[49].

REMEMBER

This step shows the relevance of effectively recording the data (by operators or artificial intelligence such as a chatbot) in a feedback log sheet or any other useful tool, since data reporting is key for making decisions about the tool performance[50].

j. Sharing with the community the adjustments in the response

We need to decide how we will share with our target audience the changes that have been made as a result of their feedback (information provided by the users for improving our services). This will build trust among community members and will ensure that they will keep using the feedback system[51].

This phase is an essential part of community accountability regarding the way we work, and both the Red Cross staff and the managers of the programme must be engaged in this process.

k. Exit strategy

The exit strategy involves informing the users about the scope and length of the intervention. We must ensure we are informing in a timely manner what will happen after transferring or closing the line, which will be the system used after finishing the operation, including who will oversee that system. We must even provide contact information in the event users need assistance after the WhatsApp line is no longer operating. We must also consider how we will share with the users the achievements accomplished at each phase and how they can participate in the decision of what will happen after the line service has concluded[52].

[49] International Federation of Red Cross and Red Crescent Societies. (2020a). WhatsApp empresarial para el Programa de Transferencia Monetaria en contexto de COVID-19: El caso de la Cruz Roja Ecuatoriana.
[50] International Federation of Red Cross and Red Crescent Societies. (2020d). Migrant Satisfaction Surveys on Health Days in Peru. IFRC.
[51] International Federation of Red Cross and Red Crescent Societies. (2016). A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do. International Federation of Red Cross and Red Crescent Societies http://media.ifrc.org/ifrc/wp-content/uploads/sites/5/2017/12/IFRC-CEA-GUIDE-0612-LR.pdf
[52] International Federation of Red Cross and Red Crescent Societies. (2019). tool15 FEEDBACK STARTER-KIT. IFRC. https://media.ifrc.org/ifrc/document/tool-15-feedback-starter-kit/

6. TOOLS

Tool	Aim
How to get started with the WhatsApp Business app	Steps to build a profile on WhatsApp Business
A Red Cross Red Crescent Guide to Community Engagement and Accountability (CEA): Improving communication, engagement and accountability in all we do.	Characteristics of community engagement and accountability.
Tool15 FEEDBACK STARTER-KIT	Document that explains the steps for establishing feedback mechanisms.
Closing the Loop: Effective feedback mechanisms in humanitarian contexts. ALNAP-CDA Guidance	Document that explains the steps for developing feedback mechanisms.
How to Establish and Manage a Systematic Community Feedback Mechanism: Special focus on migration programmes	Document that explains the steps for developing feedback mechanisms with a special focus on migration programmes.
Evaluación regional de necesidades de información y comunicación.	Example of a primary source of information about getting to know our target audience.
WhatsApp Information Line on COVID-19 Toolkit	Checklist to implement a WhatsApp line and budget template.
Terms of Reference for operators	Example of the operators' profile from the IFRC Andean Cluster case study in Peru.
Frequently asked questions (FAQ) in the WhatsApp Information Line on COVID-19	Example of FAQ from the IFRC Andean Cluster case study in Peru.
Introducing server feature in WhatsAuto app	Steps to configure reply messages.
Customer Service Protocol - COVID-19	Example of the customer service protocol from the Peruvian case.
Guidelines for the use of the WhatsApp line by medical operators	Example of medical operators' training from the Peru case study.
Note on the need for robust data protection measures in response to migration flows in the Americas	Document about data collection and protection.
ICRC Rules on Personal Data Protection	Document about personal data collection and protection.
IFRC Secretariat Policy on Prevention and Response to Sexual Exploitation and Abuse	Document to take in consideration when receiving sensitive information.
Feedback log sheet COVID-19	Example of a log sheet from the Peru case study.

Communication materials for the CTP WhatsApp line	Communication materials from the experience in Ecuador.
Communication materials for the COVID-19 WhatsApp line	Communication materials from the experience in Peru.

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THE FUNDAMENTAL PRINCIPLES
OF THE INTERNATIONAL RED CROSS AND RED CRESCENT MOVEMENT

Humanity

The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality

It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality

In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence

The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service

It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity

There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality

The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

The International Federation of Red Cross and Red Crescent Societies (IFRC) is the world's largest humanitarian network, with 192 National Red Cross and Red Crescent Societies and around 14 million volunteers. Our volunteers are present in communities before, during and after a crisis or disaster. We work in the most hard to reach and complex settings in the world, saving lives and promoting human dignity. We support communities to become stronger and more resilient places where people can live safe and healthy lives, and have opportunities to thrive.