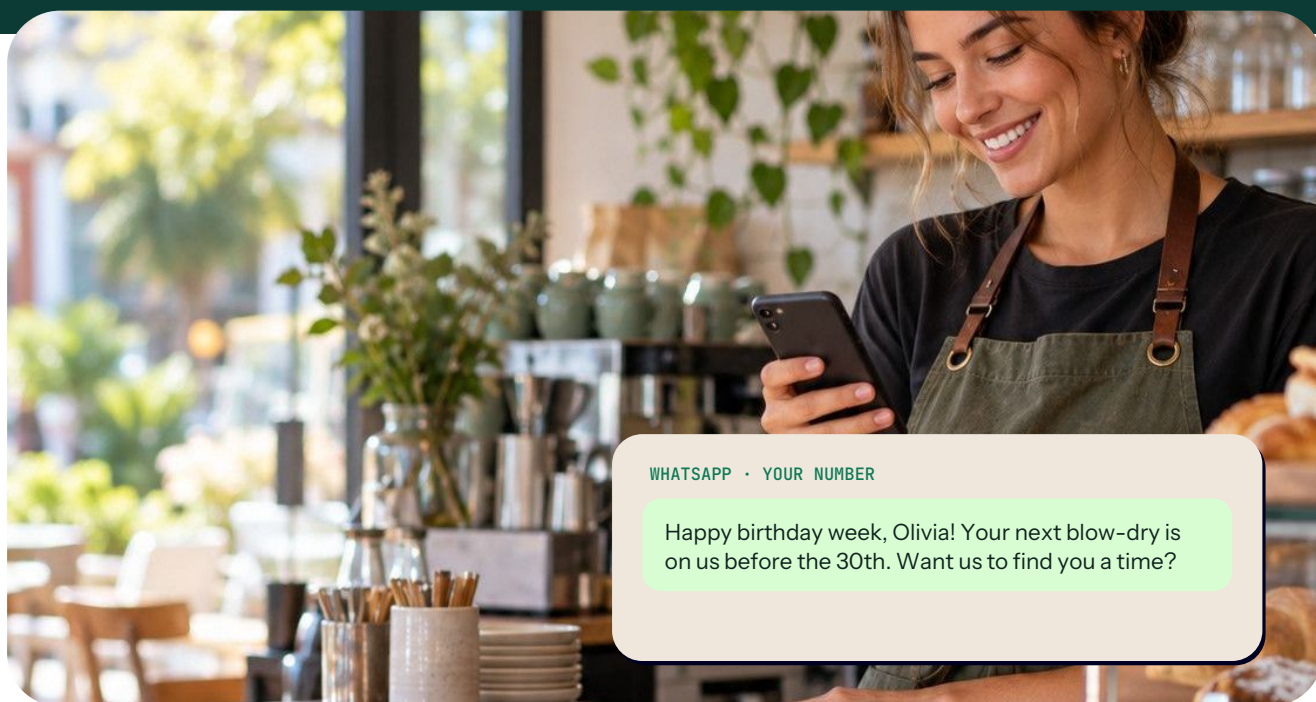


Remember the dates your customers care about.

A personal message on a birthday or membership anniversary is one of the few marketing messages people are glad to get.



INSIDE THIS GUIDE

- The moment and why it slips
- A sample conversation
- Message templates to adapt
- Node-by-node build
- How the journey works
- The data you need
- Example sheet
- What to measure

01 At a glance

TEAM

Marketing

STARTS FROM

Google Sheets, Contact import, Zapier

TRIGGER

A due list in your sheet shows customers whose birthday or anniversary is in the next few days.

GOAL

Warmer relationships and more visits in birthday weeks.

STOPS WHEN

Offer used, reply received, opt-out, or reminder sent.

LIKELY META CATEGORY

Marketing. Meta confirms it when it reviews your template.

02 In practice

Birthday and anniversary messages are among the few marketing messages people are genuinely glad to get, as long as they're personal and easy to redeem. Send a few days before the date so there's time to book or visit.

03 The moment

THE MOMENT

A regular customer's birthday is next week, and it's in your loyalty sheet.

WHY IT SLIPS TODAY

Birthday offers are easy to set up and easy to forget. Sent by email, they're often missed.

WHAT CHANGES

Warmer relationships and more visits in birthday weeks.

04

How the journey works

The steps on the left, and what your customer sees on the right.

Trigger: A due list in your sheet shows customers whose birthday or anniversary is in the next few days.

1

Send

A personal note with the offer, a few days before the date.

2

Reply

Bookings or questions go to your team.

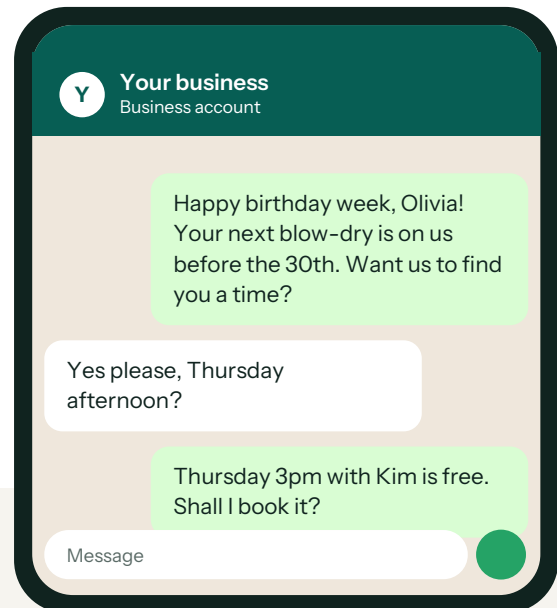
3

Reminder

Optional: a reminder before the offer expires.

Stops when

Offer used, reply received, opt-out, or reminder sent.



A fictional example. Write templates in your own voice and get them approved by Meta.

05

Data you need

Each item is a column in your Google Sheet, a field from Zapier or a Shopify property. Only the WhatsApp number is required.

- First name
- WhatsApp number
- Birthday or join date
- Offer or reward
- Marketing consent

06

Set it up in ConvoHut

- [] Add birthdays or join dates to your customer sheet.
- [] Create a daily or weekly due list for upcoming dates.
- [] Write the birthday template.
- [] Test with your own date.

07 The message sequence

Example templates. {{variables}} are filled from your sheet or store. Submit each one to Meta for approval.

1. 3 days before the date (from a due list)

MARKETING · birthday_v1

Happy birthday week, {{first_name}}! {{offer}} is on us before {{expiry}}. Want us to find you a time?

Buttons: Book now | Maybe later

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	birthday	offer	expiry
Olivia	+614... ..	2 Oct	A free blow-dry	30 Oct
Ravi	+614... ..	4 Oct	A free coffee	31 Oct
Hana	+614... ..	6 Oct	\$20 off	31 Oct

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	A daily "birthdays in 3 days" tab.
SEND MESSAGE	birthday_v1	
WAIT FOR REPLY	Timeout: 5 days	
NOTIFY ME	On reply	Front desk books them in.
END FLOW		

10 Branches

ON REPLY

Reception books them in directly from the inbox.

ON TIMEOUT

No further messages. The offer expiry does the rest.

ON OPT-OUT

The contact leaves the journey and is excluded from future marketing messages.

11 Mistakes to avoid

- Asking for a birth year.
- Offers with complicated conditions.
- Sending on the day, leaving no time to use it.

12 Measure and improve

What to measure

- Messages sent
- Offers redeemed
- Replies and bookings
- Opt-outs

Good practice

- Send a few days early so there's time to use it.
- Make the offer simple to redeem.
- Don't ask for the birthday year.

13 Variations to try

- Gyms: membership anniversaries with a free guest pass.
- Restaurants: a birthday dessert.
- Pet stores: pet birthdays.

14 Questions

Where does the birthday data come from?

From your customer sheet, loyalty tool or booking system export. ConvoHut reads the date column.

Can I send it on the day?

Yes, or a set number of days before. Earlier usually gives people time to plan.

15 Responsible messaging

Consent first

Only message people who have given you their WhatsApp number and agreed to hear from you. Include a clear way to opt out of marketing messages, honour opt-outs immediately and keep sensitive personal details (such as health information) out of messages.

16

Your next steps

1

Pick a journey

Choose the follow-up with the clearest goal for your business.

2

Connect your data

A Google Sheet, Zapier app or Shopify store. Only the phone number is required.

3

Go live in a week

Get templates approved, test with your own number and switch it on.

READY TO START?

Start your 7-day free trial

Free onboarding, training and Meta verification help on every plan. Connect your number in about 15 minutes.

dashboard.convohut.com · Book a demo: convohut.com/demo