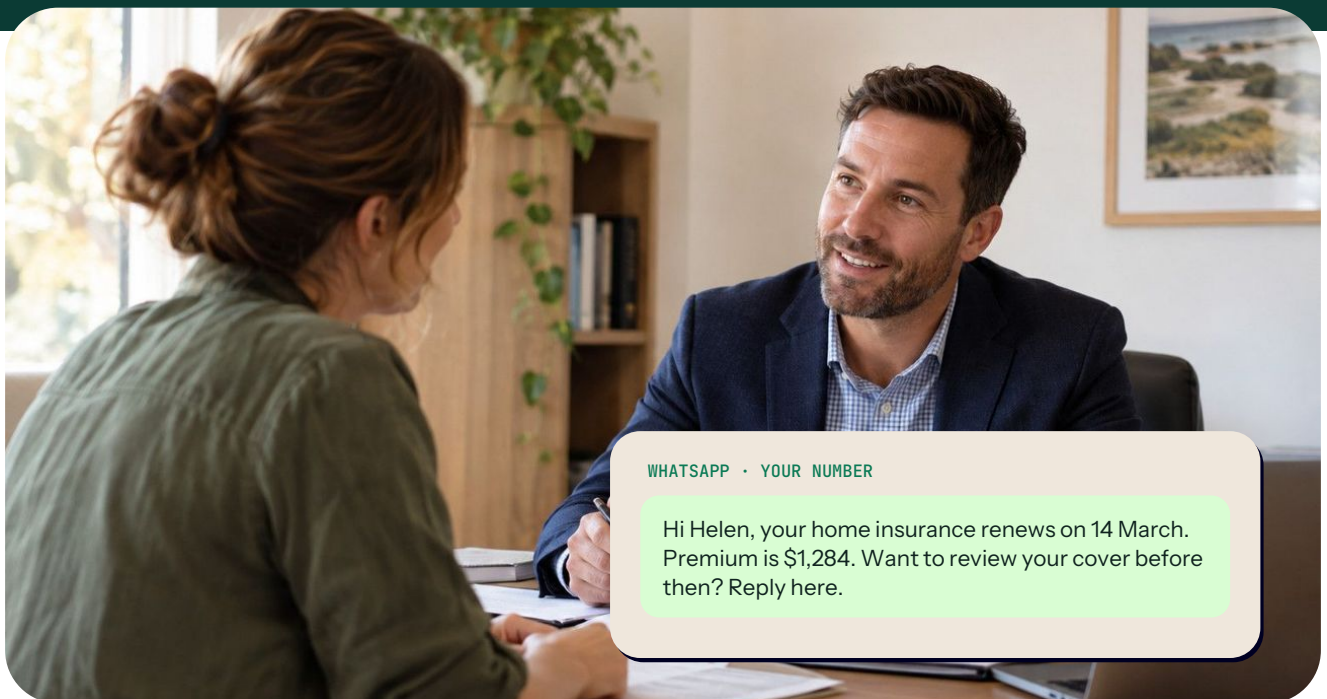


Keep customers from lapsing by accident.

Remind customers before a membership, policy, subscription or registration expires, with one tap to renew or a reply to ask questions.



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

Sales

STARTS FROM

Google Sheets, Zapier

TRIGGER

A due list shows customers whose renewal date is within your chosen window.

GOAL

More renewals, and a chance to save the customers who were thinking of leaving.

STOPS WHEN

Renewed, reply received, opt-out, or the post-expiry message sent.

LIKELY META CATEGORY

Utility. Meta confirms it when it reviews your template.

02

In practice

Many lapses are accidental: the card expired, the email went unread, life got busy. A reminder a month out, and again a week out, with the renewal price and a link, catches those. Replies with questions are save opportunities for your account manager.

03

The moment

THE MOMENT

A member's annual membership ends in two weeks and they haven't noticed.

WHY IT SLIPS TODAY

Many cancellations are accidental. Renewal emails go unread, and customers lapse without meaning to.

WHAT CHANGES

More renewals, and a chance to save the customers who were thinking of leaving.

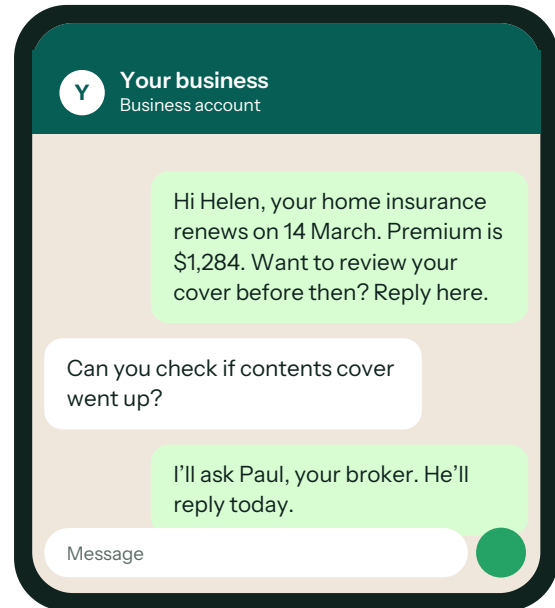
04

How the journey works

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

Trigger: A due list shows customers whose renewal date is within your chosen window.

- 1 **Early reminder**
30 days before: what's renewing and how.
- 2 **Final reminder**
7 days before, with a renewal link.
- 3 **Save**
If they reply with a concern, notify an account manager.
- 4 **Lapsed**
Optional: one message after expiry offering to reinstate.



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

Stops when

Renewed, reply received, opt-out, or the post-expiry message sent.

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
- Plan or policy
- Expiry date
- Renewal link

06

Set it up in ConvoHut

- [] Export upcoming renewals to a sheet daily or weekly.
- [] Create reminder templates.
- [] Add a renewed-status column so renewed customers exit.
- [] Route replies to the account owner.

07 The message sequence

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

1. 30 days before (due list)

UTILITY · `renewal_30_v1`

Hi `{{first_name}}`, your `{{plan}}` renews on `{{renewal_date}}` for `{{price}}`. Want to review anything before then? Just reply.

Buttons: All good | I have a question

2. 7 days before (due list)

UTILITY · `renewal_7_v1`

Reminder, `{{first_name}}`: `{{plan}}` renews in 7 days. Renew or update here: `{{link}}`

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	plan	renewal_date	price	owner
Helen	+614... ..	Home & contents	14 Oct	\$1,284	Paul
Arjun	+614... ..	Annual membership	20 Oct	\$780	Front desk
Sofia	+614... ..	Software Pro	28 Oct	\$588	Kim

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	A “renewing in 30 days” tab.
SEND MESSAGE	<code>renewal_30_v1</code>	
WAIT FOR REPLY	Timeout: 5 days	
NOTIFY ME	On reply	The account owner handles questions.
END FLOW		
TRIGGER	New Sheet Row	A “renewing in 7 days” tab.
SEND MESSAGE	<code>renewal_7_v1</code>	
END FLOW		

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Branches

ON REPLY

The account owner is alerted and has three weeks to fix any issue.

ON TIMEOUT

The 7-day reminder still goes out from its own tab.

ON OPT-OUT

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

11

Mistakes to avoid

- Only reminding the week of expiry.
- Hiding the renewal price.
- Treating a question as a cancellation.

12

Measure and improve

What to measure

- Renewals due
- Renewed before expiry
- Replies asking for changes
- Lapsed customers reinstated

Good practice

- Start early enough to fix problems.
- Make the renewal price clear.
- Treat a question as a save opportunity.

13

Variations to try

- Insurance brokers
- Gyms and clubs
- Software subscriptions
- Vehicle and equipment registrations

14

Questions

Can I send this to every customer?

Send to customers with an active relationship who have agreed to WhatsApp messages from you.

Can reminders use different timings per product?

Yes. Set the waits in each journey, or include the reminder date in your sheet.

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.

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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