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# Birthday and loyalty SMS: rewarding regular customers without overdoing it

SEO & Marketing

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# Birthday and loyalty SMS: rewarding regular customers without overdoing it

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**The short answer:** a birthday SMS with a small gift and a thank-you message to your best customers are among the best-received campaigns, because they are **personal** and **expected**. In the SMS Center, the simplest way is to keep **one group per birthday month** and one group of loyal customers, and send each a few messages that are worth reading.

## Birthdays: one group per month

A contact record holds the name, company, phone, e-mail and notes. For birthdays, create twelve groups ("Birthday - January", "Birthday - February"…) and put each customer in theirs. At the start of each month, send that month's group an offer valid for the whole month.

1. **Ask for the birthday month** on the sign-up form or at the counter. You do not need the day, or the year.
2. **Create the twelve groups** under Contacts and put each customer in their month. A contact can also be in other groups.
3. **Prepare all twelve campaigns at once** and schedule each for the morning of the first working day of the month.
4. **Count the offers redeemed** with a code of their own, to see whether it is worth it.

An example, with the contact's first name:

```
Happy birthday {$contact_first_name}! Your coffee is on us all this month. Show this message at the counter. [COMPANY]
```

In Portuguese, writing without accents such as "é" and "ç", as the page templates do, leaves more room in a single part: see **how many credits an SMS uses**.

## Loyalty: looking after people who keep coming back

| Idea | Example |
|---|---|
| **Early access** | `Hi {$contact_first_name}, the sale opens tomorrow, but for you it starts today. [COMPANY]` |
| **Double points** | `Hi {$contact_first_name}, your loyalty card earns double points today. [COMPANY]` |
| **Thank-you with no offer** | `Hi {$contact_first_name}, thank you for being with us this year. See you soon! [COMPANY]` |
| **Milestone reward** | `Hi {$contact_first_name}, that was your 10th visit! Your next one is 20% off. [COMPANY]` |

Build a "Loyal customers" group with the people who buy most often, from your sales system, and refresh it now and then.

## Without overdoing it

1. **One birthday message a year.** Do not add reminders halfway through the month.

2. **Exclusive offers must be exclusive.** If the same offer goes to the whole list the following week, loyal customers notice.

3. **A thank-you with no offer still counts.** Once a year, a message just to say thanks reminds customers they are not just another number.

**Use the name with care.**
`{$contact_first_name}` only works for numbers saved in your contacts with a name filled in. And a name with accents, such as "João", can switch the message to Unicode and use more parts. See **personalised SMS**.

**Only ask for the birthday month from people who agreed to receive offers**
, and say what it is for. It is personal data: keep it only in the SMS Center and your own system, and do not share it.

RECOMMENDED

Want to reward your best customers by SMS? See SMS Marketing.

See the SMS Marketing page →

SEE ALSO

- Personalised SMS with the contact's name: variables, examples and pitfalls
- Segmenting SMS campaigns with contact groups: by purchase, area, interest and activity
- Win-back SMS campaigns: bringing back customers who stopped coming
- An SMS marketing calendar for the year: seasons, paydays, back to school and year end
- SMS templates and AI: ready-made messages, the template library and improving a text

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