Send client birthday offers without remembering them

> *"I know a birthday message brings people back in, but I never remember and I'm not trawling a spreadsheet every week."*

Category: lead-management | **Setup Time:** ~25 minutes | **Estimated Hours Saved:** 1 hrs/week | **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Let the system that already stores client birthdays send the message for you. Most booking and CRM tools collect a date of birth at intake and can trigger an email or text on the day without anyone checking a list. Set it once and it runs every year, reaching clients on the one day they are most likely to book something for themselves.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking system or CRM:** **(Free Tier / Wholesale)**
- **Mailchimp:** **(Free Tier / Wholesale)**
- **Klaviyo:** **(Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Check whether you already collect date of birth**
   Most clinical intake forms do, for treatment eligibility. If it is on the form it is in the system, and you may need no new tool at all.

2. **Add the field if it is missing, and ask for day and month only**
   Year is not needed for a birthday message and asking for less gets more people to fill it in.

3. **Build one message and keep it short**
   A line that sounds like a person, and one clear thing they can do. A specific offer with an expiry outperforms a generic greeting because it gives a reason to act now.

4. **Set the trigger to fire on the day, in the morning**
   Find date-based, anniversary, or birthday automation in your tool. Morning beats evening — people book while the day still feels like theirs.

5. **Exclude anyone with a booking in the next fortnight**
   Someone already booked does not need an incentive to come in, and sending one costs you the discount for nothing.

6 **Send yourself a test with your own birthday set to tomorrow**

Then change it back. Automations that fire on a date are the easiest kind to get silently wrong.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Is a discount necessary?

A: No, and it is worth testing without one. A message that simply remembers the person performs well on its own. If you do add an offer, put an expiry on it or it will sit unused.

Q: What does it cost?

A: Often nothing if your booking system already holds the birthday and can trigger on a date. Otherwise an email tool with a free tier covers it until your contact list outgrows the ceiling.

Q: Will this feel intrusive?

A: Not if it is one message on the day and nothing else. It reads badly when it arrives days late, or when it is obviously a mail merge with the name in the wrong case.