



CUSTOMER BIRTHDAY CELEBRATION CHECKLIST



STRATEGY & PLANNING

- ☐ Define your goal (loyalty, re-engagement, upsell, brand touchpoint)
- ☐ Decide on the offer: discount, gift, free upgrade, exclusive access
- ☐ Segment your audience (e.g., VIPs, high spenders, new customers)
- ☐ Align tone and visual style with your brand voice

EXECUTION & CRM MAINTENANCE

- ☐ Collect birthdates via forms, account creation, or loyalty program
- ☐ Maintain an up-to-date list in your CRM or email platform
- ☐ Tag customers by birth month for batching and automation
- ☐ Set up automatic birthday flows (e.g., via Klaviyo, HubSpot, Mailchimp)
- ☐ Regularly audit the list for accuracy and engagement status
- ☐ Ensure consent for promotional emails is collected and honored
- ☐ Sync CRM data with marketing tools to personalize messaging





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COMMUNICATION & TIMING

- ☐ Send first email or SMS 3–7 days before the birthday
- ☐ Follow up with a reminder or “celebration week” message
- ☐ Personalize copy and imagery with customer name or preferences
- ☐ Include urgency (e.g., “Your birthday gift expires in 48 hours!”)

GIFT & OFFER SETUP

- ☐ Create unique codes or gated content (if needed)
- ☐ Choose gift type: % off, free item, points boost, early access
- ☐ Set clear expiration dates and redemption instructions
- ☐ Test across desktop and mobile to avoid broken links or codes

FULFILLMENT & EXPERIENCE

- ☐ If shipping, include custom inserts or birthday-themed packaging
- ☐ Prep customer service to respond to birthday offer questions
- ☐ Offer in-store staff training for birthday perks (if brick-and-mortar)
- ☐ Encourage social sharing or reviews tied to birthday experience



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FOLLOW-UP & OPTIMIZATION

- ☐ Track open rates, CTRs, and redemption rates monthly
- ☐ Segment high and low performers for testing
- ☐ Gather direct feedback when possible
- ☐ Fold successful elements into larger loyalty or retention strategy

COMPLIANCE & DATA PRIVACY

- ☐ Ensure birthday data collection complies with GDPR, CCPA, etc.
- ☐ Include clear opt-in language on data collection forms
- ☐ Allow customers to update or remove their birthdate at any time
- ☐ Avoid collecting unnecessary personal info beyond what's needed

TEAM & WORKFLOW ALIGNMENT

- ☐ Assign clear ownership (e.g., CRM manager, lifecycle marketer)
- ☐ Create internal SOPs for list management and automation testing
- ☐ Communicate campaigns to support and store teams ahead of time
- ☐ Set quarterly reviews to refine creative, offers, and targeting