greenPROFIT

Tech Connection

9/30/2025

They Say It’s Your Birthday!

Katie Elzer-Peters

So many times, potential new customers are incentivized to sign up for marketing emails, but existing customers don’t get the same great one-time deal. The easiest way to fix that? Send a “birthday card.”

Text Connection

Jen Polanz emailed me after attending a webinar with one of MY favorite SMS platforms for brick-and-mortar retailers, TapOnIt, and one of their customers, Meadows Farms, who talked about the success they had with their birthday offer that goes out via text (SMS) messaging. This type of offer is a great way to give them something special while keeping them closer to the fold. You can also send a birthday offer via email. Anything that gives people an excuse to come shopping!

The Magic of a Preferences Form

How do you figure out when your customers’ birthdays are? That’s the tech part of this month’s column. You create a preference form! Preference forms are a standard part of doing business for e-commerce and they’re super useful for brick-and-mortar businesses, too. Let’s back up a minute.

You can collect ANY of the information you’d take in via a preference form at the point you ask people to sign up for email or SMS. Here’s the issue: you’ll get more sign ups if you start by asking for—at most—first name and email address. If you have a two-part form to capture SMS, you can ask people for their birthday month to send them a special coupon when you ask them for their phone number. But that’s it!

I used to have a gigantic form for people to fill out when they wanted to inquire about working with me. Then someone said to me, “So do you always get married on the first date?”

Oh.

OH!

Yeah, nobody wants to give you ALLLLLLL their info up front. You have to prove you’re worthy of having it and that you’ll treat it carefully.

Once they’ve given you their email address, they’re much more likely to give you more info—their phone number—because they’ve already taken the first hard step—giving you something—which is why it makes sense to collect a birthday month on the SMS part of the form.

So what if you've been emailing forever and you're just starting to offer a birthday coupon? THAT is where the preferences form comes in. It's a way to ask customers to give you more information after they've already been on your list for a while.

Preferences forms are also a way to divert customers away from unsubscribing and toward a different frequency of emails or type of emails from you.

How to Set It Up

Any email marketing provider offers the ability to give your customers a preferences form. Not sure where to find that in your system? Just search "preferences form setup in XYZ" (the XYZ is your email program like Mailchimp or Klaviyo). You'll find directions for setting one up.

Here are some things you can ask about in a preferences form:

How often would you like to hear from us?

- Weekly
- Monthly
- Send me everything!

What are your top interests?

- Classes & Workshops
- Special Events
- Container Gardening
- Growing veggies
- Perennial or native plant gardening

What's your birthday month?

Make a checkbox or use a drop-down menu to offer the months.

A neat trick from one of our clients, A Plus Garden Center in Duluth, Minnesota, is to send coupons on the half birthday month for people born in months they're closed. (They're open April-October, so people with birthdays November-March get a coupon for their HALF birthday.) Owner Tabatha Beier said, "We don't want them to miss out! Plus, it's a fun extra for those customers during summer."

Once the form is set up, you can link it in your email footer, so you'll have two links down there: Unsubscribe and Manage Your Preferences. The way preferences are indicated in a customer's profile depends on the email provider. For some, it tags the customer. For others, it adds a custom profile field. You can use all of that information to create segments and then deliver customers the type of content in the frequency they want it. Note: Don't ask customers about preferences if you're not going to use them. If they spend the time to give you that info, you need to use it, otherwise you'll erode their trust in you.

Ask Customers to Fill Out the Form

Just because you make a preferences form doesn't mean your customers will fill it out. You should be able to grab short code for the preference form from your email provider to pop into an email. In that email, let the customers know about the new birthday coupon and some other ways you're planning to customize information you send them.

Then ask them to CLICK HERE TO GIVE US YOUR PREFERENCES.

If they know they're gonna get a birthday surprise, and hear less frequently about things they don't care about, they'll jump at the chance to help you.
Do you need help? Drop me an email. I'll point you in the right direction. **GP**

Katie Elzer-Peters is the owner of The Garden of Words, LLC, a green-industry digital marketing agency. Contact her at Katie@thegardenofwords.com.

> **Learn More About SMS**
> The impetus for this column was a fireside chat about text marketing hosted by TapOnIt owner Katie Castillo-Wilson. GO HERE to see the full chat with Meadows Farms Nursery & Landscaping VP Bobby Lewis and Wallace's Garden Center Owner Kate Terrell.