Repeat Customer Promotions

A practical loyalty, bounceback and opted-in messaging toolkit



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For restaurants testing a clear reason for existing guests to return. Build one offer around a useful occasion, explain it plainly and check both guest experience and economics. All examples are hypothetical. This toolkit does not establish legal compliance or cover prepaid stored value, gift-card accounting, sweepstakes or regulated-product promotions.

Inside this toolkit

1. Give guests a relevant reason to return
2. Cost the reward and the visits it replaces
3. Make loyalty and bouncebacks easy to use
4. Send only to the right opted-in audience
5. Learn from feedback without buying reviews

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Give guests a relevant reason to return

Choose one return occasion that fits your service: another weekday lunch, a quiet early dinner or the next family pickup. Start with the guest’s need and available capacity. A promotion that shifts a full-price Saturday visit to a discounted Saturday visit may add cost without adding useful demand.

- Use only data you may appropriately use. Define a simple group such as recent lunch guests who separately opted into email. Do not infer sensitive personal traits or buy contact lists.
- Pick one mechanism: a clearly defined earned reward, a next-visit bounceback or an update about something relevant. Do not launch several overlapping offers at once.
- Set dates, eligibility, qualifying purchase, reward, redemption channel, exclusions and capacity. Explain these before the guest commits.
- Write a service plan: what the cashier checks, how the POS records it and who resolves disputes. Test the complete path before launch.

Hypothetical example: a neighborhood restaurant has spare capacity from 5-6 p.m. on weekdays. It tests a next-visit side with a qualifying main, instead of discounting the whole bill during its busiest period. The specific item, dates and limits appear on the offer.

Start small enough to learn safely. Stop issuing new offers if service cannot fulfill them, while handling already-issued commitments under the published terms and applicable requirements. Do not silently change an offer guests already earned.

Cost the reward and the visits it replaces

Price the real redemption, not just the headline discount. Include food, packaging, payment fees, extra labor and any campaign cost. Net sales already reflect discounts; do not deduct the same discount again when calculating the contribution of an actual transaction.

- For a discounted purchase: contribution per redemption = net sales after the offer minus directly associated variable costs.
- For a free item: include its actual variable cost and any paid-sale displacement. Retail value is not the same as cost.
- For earned loyalty: estimate the cost of future rewards created by qualifying visits. Track rewards earned, redeemed and still outstanding. Ask your accountant how to treat program obligations.
- Set a minimum acceptable contribution and a maximum issuance quantity before launch. Model higher redemption and lower additional-visit assumptions, not only your favorite case.

Hypothetical example: an offer reduces contribution from $12 to $9 on each redemption. Of 40 redemptions, suppose 10 are genuinely additional visits and 30 would have happened at full price. The additional visits contribute $90; the other 30 lose $90 of contribution; an $80 campaign cost leaves an estimated $80 loss versus no offer. The assumed 10 additional visits are not verified facts.

A high redemption rate can coexist with poor economics. Use observed transactions to measure attributed results, then label any estimate of incremental impact separately. Reward limits should simplify fulfillment and protect capacity, not hide conditions.

Make loyalty and bouncebacks easy to use

Choose rules a cashier can explain in one sentence. A paper card can be enough for a small pilot; a digital program needs tested enrollment, reward tracking and opt-out settings. Loyalty enrollment and permission to receive marketing are separate decisions.

- Loyalty: define what earns credit, when credit is added, what reward is earned and how redemption works. Decide how duplicate accounts, forgotten cards, refunds and corrections are handled.
- Bounceback: issue one clearly dated next-visit offer with a unique or controlled code. State whether it is one use, who may redeem it and which items or service periods qualify.
- Train staff with three test cases: valid redemption, expired or ineligible offer and a guest dispute. Staff should explain the rule without shaming the guest.
- Record earned and redeemed benefits consistently. Restrict manual overrides to named roles and review unusual patterns without assuming fraud.

Hypothetical loyalty structure: after five qualifying lunches, earn one specified side with a subsequent qualifying lunch. Before using it, fill in the purchase threshold, item, dates, redemption limits and any exclusions. Check local rules and your platform’s terms, including whether expiry conditions are allowed.

Pilot check: can a new employee explain the program, enter a redemption and find the dispute policy without calling the owner? If not, simplify the rules before inviting more guests.

Send only to the right opted-in audience

This toolkit uses an opted-in-only approach for marketing messages. A reservation, receipt address or order-status phone number is not a shortcut to a marketing list. Use your provider’s approved enrollment flow and retain a record of channel, scope, time and consent language. This is not a universal consent form.

- Before each send, select the intended audience and suppress unsubscribed or ineligible contacts. Test the message, link, date, price and redemption instructions with staff.
- Identify the restaurant, explain one useful offer and use one next action. Set a frequency that matches the enrollment promise and guest expectations.
- Separate service messages from marketing. Do not append an offer to an order update to bypass marketing preferences.
- Use the provider’s unsubscribe tools, confirm they work and review applicable local requirements, carrier rules and allowed sending times.

Provider checkpoint: Twilio requires prior express written consent for promotional messaging, identifies consent as subject-specific and prohibits bought or transferred consent. It also requires clear sender identification and a straightforward opt-out. These are Twilio rules, not a complete statement of every country’s law. Source 1.

For U.S. commercial email, check the FTC guidance on truthful identification, subject lines, postal address and opt-out handling. Source 2. Have your provider or qualified adviser review the enrollment and sending setup before starting automated campaigns.

Learn from feedback without buying reviews

Ask a short, neutral question that can improve the operation: “What would make your next visit easier?” Keep private feedback separate from public-review requests and from rewards. A guest should receive the stated benefit regardless of whether their feedback is positive.

- Keep a feedback form short: occasion, one rating if useful, one open question and optional permission for a reply. Collect only information you need.
- Do not route only satisfied guests to a public-review link or condition a reward on posting, editing or removing a review. Google prohibits incentivized reviews and selective positive-review solicitation. Source 3.
- Review return behavior using a consistent cohort and window. State how customers are identified and which visits are unobservable, such as anonymous cash transactions.
- Track opt-outs, complaints, fulfillment errors and reward cost alongside redemptions. A promotion that irritates guests or creates service failures needs adjustment.

Hypothetical cohort check: of 80 identifiable guests issued an offer, 16 return within 30 days, a 20% observed return rate. That rate does not establish a 20% lift. Some guests would have returned anyway, and unidentified visits may be missed. Compare with a suitable baseline or thoughtfully designed test if you want stronger evidence.

At the review date, choose continue, revise or stop. Document both the numbers and the reason. Keep a plain-language record of commitments still owed to guests when winding down a program.

Template 1. Repeat-visit offer brief

Campaign: [name] | Owner: [name] | Intended return occasion: [specific visit] | Spare service capacity: [day/time/volume]. Complete every field before printing or sending.

Decision	Our offer
Who qualifies	[guest group and conditions]
Qualifying purchase	[items/minimum spend; exclusions]
Benefit and actual cost	[reward; estimated variable cost]
Issue and redemption dates	[start/end; time zone if needed]
Redemption method and limits	[code/channel; uses; stacking policy]
Capacity and issuance cap	[maximum issued and fulfillment plan]
Guest questions / disputes	[contact; staff authority]

- Minimum contribution per redemption: [amount].
- Expected redemptions / high case: [count] / [count].
- Likely full-price visits displaced: [estimate and rationale].
- Stop/new-issuance pause rule: [threshold].
- Legal/platform/operations review complete: [reviewer/date].

Template 2. Loyalty program rules and ledger

Guest-facing draft: “Earn [one credit] for each [qualifying purchase]. After [number] credits, receive [specific reward] on [eligible visit]. [Dates, exclusions, limits and redemption details]. Ask us at [contact] if a credit is missing. Marketing messages are optional and require separate enrollment.”

Rule to resolve	Approved answer
Multiple purchases / split bills	[what earns credit]
Refunds and canceled orders	[credit adjustment rule]
Lost card / duplicate account	[verification and correction method]
Reward expiry and program changes	[reviewed terms and notice method]
Manual adjustments	[authorized roles and audit trail]

Record / date	Credit earned	Reward redeemed	Balance / approver
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]

Manager weekly check: [credits/rewards reconcile; outstanding benefits reviewed; exceptions resolved]. Do not place full contact or payment details in this working ledger.

Template 3. Bounceback card and cashier check

Guest-facing draft: “A reason to come back: enjoy [specific benefit] when you buy [qualifying item/purchase] on your next visit. Valid [dates and service times] at [location/channel]. Show code [code] before payment. [One-use limit, exclusions, combination rules and other material conditions]. Questions? [contact].”

Keep essential conditions on the offer, not hidden behind an unexplained link. Use a terms page for additional detail only after the core offer is clear.

Cashier check	Result
Correct date, location and service period	[yes/no]
Qualifying purchase present	[yes/no]
Code valid and unused where required	[yes/no]
Guest knows final price before payment	[yes/no]
POS code and issued benefit recorded	[reference]
If declined, explain reason and approved next step	[reason/manager]

- Test purchase completed by: [name/date].
- Hypothetical one-sentence explanation: “This card gives you [side] with [main] on a return visit during [dates].”
- Unused printed cards withdrawn after: [date]. Existing guest commitments handled by: [plan].

Template 4. Private guest feedback form

Opening: “We would like to make your next visit better. This short feedback form is optional. Please avoid including payment details or sensitive personal information.”

- 1. What brought you in today? [lunch / dinner / pickup / other].
- 2. How easy was it to order and receive what you expected? [very easy / easy / mixed / difficult / very difficult / not applicable].
- 3. What one thing should we improve? [open response].
- 4. Is there anything you would like us to keep doing? [open response].
- 5. Would you like a reply about this feedback? [no / yes, contact method]. Explain how the contact information will be used and retained before collection.

Internal routing: [person] reviews by [cadence]. Urgent safety concerns go immediately to [role/protocol]. Routine themes go into the weekly operations review.

Keep this form separate from public-review requests. Do not use a score threshold to decide who is allowed to see a review link. Do not treat permission to reply about feedback as permission for future marketing.

Theme / action / owner / review date: [fill in].

Template 5. Opted-in message pack

For eligible marketing subscribers only. Replace all brackets, verify terms and use your platform’s required footer and opt-out controls. These drafts do not replace consent, registration or local-law review.

Email subject: “[Restaurant]: [specific reason] for your next [occasion]”

Email body: “Planning your next [occasion]? [Specific offer or useful update] is available [dates/times] at [location]. [Qualifying purchase and main conditions]. See the details or order here: [verified link]. Questions? [contact]. [Restaurant name and valid postal address]. Unsubscribe from marketing: [working link]. [Advertising identification where required].”

SMS draft: “[Restaurant]: [specific offer] on [dates], with [key condition]. Details: [verified link]. Reply STOP to unsubscribe.” Check length, segment cost and supported opt-out behavior in your actual platform.

Non-discount email alternative: “Our [item/service] is back for [verified period]. If it suits your next [occasion], see the current menu at [link]. [Required footer and unsubscribe link].”

- Audience and consent source checked: [name/date].
- Suppression list and unsubscribe test passed: [name/date].
- Offer, stock, capacity and links approved: [name/date].
- Send window, frequency and platform requirements reviewed: [name/date].

Template 6. Promotion review and permission audit

Measure	Result	Definition / limitation
Offers issued	[count]	[unique guests/cards]
Offers redeemed	[count]	[valid recorded redemptions]
Identifiable guests returning	[count / eligible cohort]	[window; missing anonymous visits]
Net redemption sales	[amount]	[after discounts/refunds]
Variable and campaign costs	[amount]	[included costs listed]
Opt-outs / service issues	[counts]	[denominator and themes]

Attributed contribution: [net redemption sales minus direct costs minus campaign costs]. Estimated incremental contribution, if modeled: [amount], using [additional-visit and displacement assumptions]. Do not label the estimate as verified profit.

Permission control	Evidence / owner
Separate channel-specific enrollment	[consent record location; no raw contacts here]
Current scope and frequency	[enrollment version/date]
Suppression and opt-out processing	[tested process/owner]
Only necessary data retained	[review date/access owner]

Decision: [continue / revise / stop]. Reason: [evidence]. Outstanding rewards and guest commitments: [count/handling plan]. Next review: [date].

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. Twilio Messaging Policy

Provider requirements for consent, identification and opt-out in messaging. Other providers and jurisdictions may differ. Checked 23 October 2026.

https://www.twilio.com/en-us/legal/messaging-policy

2. FTC: CAN-SPAM Act compliance guide for business

U.S. commercial-email sender, content and unsubscribe requirements. Checked 23 October 2026.

https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

3. Google Maps: Prohibited and restricted content

No incentivized reviews or selective solicitation of positive reviews. Checked 23 October 2026.

https://support.google.com/contributionpolicy/answer/7400114?hl=en

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.