

The Reactivation Operator Playbook

From database export to signed contracts: the campaigns, segmentation, messages, qualification, handoff, and decision rules that make lead reactivation work.



THE THESIS

Most businesses do not need more leads before they have fully monetised the leads they already paid to acquire.

Built as an implementation manual. Use it to audit the database, choose the right campaign, launch the sequence, route replies, qualify opportunities, and move buyers into a signed agreement.

One map. Seven stages.

Every reactivation campaign should move through the same operating system.

STAGE	JOB	OUTPUT
1. Collect	Export the right records	CRM, forms, quotes, carts, customers
2. Clean	Suppress what should never be contacted	Opt-outs, hard bounces, duplicates, bad data
3. Segment	Group by context and intent	Why they raised their hand; when; what happened
4. Prioritise	Score value + intent + recency	Work the highest expected value first
5. Reactivate	Send a context-rich sequence	Low-friction CTA, multiple channels where lawful
6. Qualify	Separate curiosity from buying intent	Need, timing, authority, value, next step
7. Close	Convert interest into a contract	Fast handoff, call, proposal, follow-up, signature

THE OPERATING RULE

Do not optimise email open rates. Optimise qualified conversations, opportunities created, revenue won, and speed from reply to human contact.

Know the revenue equation before you send anything.

If you cannot model the funnel, you cannot diagnose it.

REVENUE RECOVERED

Deliverable leads × positive reply rate × qualification rate × booking rate × show rate × close rate × average contract value

INPUT	ILLUSTRATIVE VALUE	WHY IT MATTERS
Dormant leads	5,000	Inventory
Deliverable / contactable	85%	Data quality and compliance
Positive replies	4%	Message + segment fit
Qualified	50%	How much real intent exists
Booked	60%	CTA and response handling
Show	75%	Reminder and scheduling system
Closed	30%	Sales process
Average contract value	£3,000	Commercial value

ILLUSTRATIVE MODEL

$5,000 \times 85\% \times 4\% \times 50\% \times 60\% \times 75\% \times 30\% \times £3,000 \approx £34,425$ in won revenue. This is a planning model, not a guarantee.

Decision use: if the model is weak, do not simply 'send more'. Identify the constraining stage. Bad deliverability is a data problem. Low positive reply is a segment/message problem. High interest but low booking is a CTA/handoff problem. High booking but low close is a qualification or sales problem.

Build a contactability gate.

The fastest way to ruin a reactivation programme is to treat every old record as marketable.

Suppress automatically

- Anyone who has opted out or objected to direct marketing.
- Hard bounces, invalid addresses, clearly wrong phone numbers, duplicates.
- Complaints, legal disputes, fraud flags, or records with a 'do not contact' instruction.
- Contacts where the channel is not permitted under the relevant consent / PECR rules.

UK electronic marketing: practical minimum

- For individuals, marketing email/text generally requires specific consent unless the products-and-services soft opt-in applies.
- The soft opt-in requires that the organisation obtained the details directly while selling or negotiating to sell; markets its own similar products/services; offered an opt-out when details were collected; and includes an opt-out in every later message.
- Sole traders and ordinary partnerships are treated as individual subscribers for PECR electronic mail rules.
- Corporate subscribers can generally be emailed B2B marketing, but UK GDPR can still apply where personal information is used. Always respect objections and maintain suppression lists.

DO NOT 'REACTIVATE' AN UNSUBSCRIBE

A dormant lead is a commercial opportunity. An opted-out lead is a suppression record.

This playbook is operational guidance, not legal advice. Before launching at scale, document the lawful basis/channel rules that apply to the client's list and geography.

Export context, not just emails.

A database without history forces generic messaging. History is the advantage.

FIELD	REQUIRED?	USE
Contact ID	Yes	Deduplication / audit trail
First name / company	Yes	Identity + personalisation
Email / mobile	As available	Channel routing
Lead source	Yes	What created the intent
Product/service	Yes	Relevance
Created date	Yes	Recency
Last activity date	Yes	Dormancy
Lifecycle / stage	Yes	Segment
Lost / closed reason	Strongly preferred	Message angle
Quote / deal value	Preferred	Prioritisation
Owner / salesperson	Preferred	Human continuity
Notes / calls / forms	Preferred	Context
Consent / opt-out status	Essential	Contactability
Past orders / contracts	For customers	Cross-sell / win-back

MINIMUM VIABLE EXPORT

Contact + source + product + created date + stage + last activity + opt-out status. If you do not have those, fix the data before pretending you have a campaign.

Turn the export into usable inventory.

Clean in this order

- 1. Remove explicit opt-outs / objections.
- 2. Deduplicate by email, mobile, CRM ID, and company.
- 3. Separate hard bounces from unknown deliverability.
- 4. Normalise names, company names, dates, owners, deal values.
- 5. Map lifecycle stages into a small standard taxonomy.
- 6. Create 'days since last activity'.
- 7. Create a contactability flag per channel.
- 8. Create an expected-value score.

DIRTY LABEL	STANDARD LABEL
No answer / chase / not replied / ghost	GHOSTED
Quote sent / proposal sent / tender pending	QUOTE_OPEN
Lost - timing / later / not now	LOST_TIMING
Lost - price / budget	LOST_PRICE
Demo booked / no show / cancelled	NO_SHOW
Bought / complete / customer	PAST_CUSTOMER
Cart / checkout / browse	ECOM_INTENT

Segment by the reason they had intent.

Do not send one 'checking in' message to everybody.

SEGMENT	WHAT HAPPENED	BEST ANGLE	PRIMARY CTA
OLD INBOUND	Form/demo/enquiry but no deal	Still relevant?	Yes / no / when
QUOTE / PROPOSAL	Commercial step already happened	Reopen decision	Review quote
NO-SHOW / GHOST	Intent, then momentum died	Make re-entry easy	Pick a time
LOST - TIMING	Need existed; timing did not	Has timing changed?	Revisit now
LOST - PRICE	Value gap / budget gap	Change scope or economics	See lean option
PAST CUSTOMER	Already bought	New need / next outcome	Quick review
LAPSED CUSTOMER	Stopped / churned	What changed?	Win-back call
ECOM INTENT	Browse/cart/checkout	Continue unfinished action	Return to cart

RULE

A segment is useful only if it changes the message, offer, CTA, or sales handling.

Score expected value, not just recency.

DIMENSION	0	1	2	3
Recency	> 365d	181-365d	91-180d	≤90d
Intent	Weak / unknown	Content / browse	Enquiry / demo	Quote / proposal / cart
Deal value	Low	Below median	Median+	High-value
Fit	Poor	Possible	Good	Ideal ICP
Reason lost	Hard no	Unknown	Timing	Operational / solvable

PRIORITY SCORE

Add the five dimensions (0-15). Work 12-15 first, then 8-11. Review 0-7 manually before spending volume.

Override rules

- Opt-out / objection = suppress, regardless of score.
- High value + quote sent = manual review before automation.
- Known bad experience = service recovery first, sales second.
- Existing open opportunity = route to the current owner; do not create duplicate outreach.

The campaign library.

Use the smallest message that reopens the buying conversation.

CAMPAIGN	TRIGGER	FIRST MESSAGE GOAL
1. Still Relevant?	Old inbound / demo / enquiry	Get a binary status
2. Quote Reopen	Quote / proposal / estimate	Resume commercial decision
3. Ghost Recovery	No reply / no-show	Remove friction and save face
4. Timing Reopen	Closed-lost timing	Test if the constraint changed
5. Price / Scope Reset	Lost to price	Offer a narrower path
6. Customer Expansion	Past customer	Find the next adjacent need
7. Win-back	Churned/lapsed	Diagnose what changed
8. Cart / Checkout	Ecommerce intent	Resume purchase

MESSAGE PRINCIPLE

Context beats cleverness. Specificity beats hype. A low-friction reply beats a premature calendar link.

Old inbound: 'Is this still relevant?'

Use when the person raised their hand before but never reached a commercial decision.

EMAIL 1 — BINARY REOPEN

Subject: still looking at [outcome]?

Hi [First name] - you reached out to [Company] about [service / outcome] a while back.

Not sure if this got solved or simply fell down the list.

Is [problem / outcome] still relevant?

If yes, reply 'yes' and we'll pick it up from where you left off.

If not, reply 'no' and we'll close the loop.

Why it works

- Uses their own prior intent as the reason for contact.
- Removes pressure: yes/no is easier than booking.
- Gives them a dignified explanation for inactivity.
- The opt-out / no path reduces reactance and improves data quality.

Old quote: reopen the decision.

EMAIL 1 — QUOTE REOPEN

Subject: your [service] quote

Hi [First name] - we quoted you for [specific job / outcome] on [month/date].

I can see it never moved forward.

Usually that means one of three things: timing changed, the scope changed, or it got solved elsewhere.

Which was it?

If it is still open, I can get the right person to review the quote with you and tell you what has changed.

FOLLOW-UP — EASY NEXT STEP

If the old scope is still roughly right, I can also have us re-price it before the call.

Worth doing?

For high-value quotes, assign a human owner before sending. Replies should not sit in a shared inbox.

Ghost / no-show: make re-entry socially easy.

EMAIL 1 — RELEASE PRESSURE

Subject: should I close this?

Hi [First name] - we had [a call / quote / demo] lined up around [date], then lost momentum.

No problem either way.

Should I close this on our side, or is [outcome] still something you want to get sorted?

EMAIL 2 — REDUCE RESTART COST

If it is still live, I can send two times rather than making you restart the process.

Psychology

- Autonomy: they control whether the conversation continues.
- Face-saving: no accusation for ghosting.
- Loss aversion: 'close this' creates a gentle cost to inaction without fake urgency.
- Progress preservation: do not make them refill forms or repeat information you already have.

Closed-lost timing: test whether the constraint moved.

EMAIL 1 — USE THE RECORDED LOST REASON

Subject: timing changed?

Hi [First name] - when we last spoke about [outcome], the main blocker was [timing / project dependency / budget cycle].

Has that changed?

If the project is back on the table, I can send the current options and next step.

Decision rule

- If the CRM has a clear lost reason, mention it.
- If the reason is unknown, do not invent one. Ask a neutral binary/short-answer question.
- If the timing date is known, schedule the reactivation close to that date instead of blasting immediately.

Lost on price: change the economics, not the adjective.

EMAIL 1 — SCOPE RESET

Subject: smaller way to do this

Hi [First name] - last time, the full [scope] did not make sense at the budget.

Rather than reopen the same proposal, we can look at the smallest version that still gets [core outcome].

Would a reduced-scope option be useful, or has the project moved on?

DO NOT

Do not immediately discount the same package. First change scope, timing, payment structure, risk, or proof. Protect the price signal.

Past customers: reactivate from achieved outcome.

EMAIL 1 — ADJACENT NEED

Subject: quick question about [previous result / service]

Hi [First name] - we helped with [specific job / result] back in [month/year].

Since then, have you had any need around [adjacent problem / maintenance / next stage]?

If useful, we can do a quick review and tell you whether anything is worth acting on.

Strong triggers

- Service interval / maintenance date.
- New location, headcount, asset, product, or regulation.
- Seasonality.
- A new capability that directly relates to what they bought.
- A measurable result achieved previously.

Ecommerce: recover unfinished buying intent.

Baymard's 2026 benchmark reports a 70.22% average documented online cart abandonment rate across 50 studies. That makes abandoned cart / checkout a natural recovery segment - where the required marketing permissions are in place.

CART RECOVERY — USEFUL, NOT CUTE

Subject: still want [product]?

You left [product] in your basket.

If you still want it, your basket is here: [link]

If something stopped you - sizing, delivery, compatibility, price - reply and tell us. We'll point you in the right direction.

- Message 1: remind.
- Message 2: remove objection (delivery, returns, sizing, compatibility).
- Message 3: proof / FAQs / social proof.
- Incentive only when margin and customer behaviour justify it; do not train buyers to abandon for discounts.

The six levers that make reactivation feel relevant.

LEVER	WHAT IT MEANS	HOW TO USE IT
Context	Show why this person is hearing from you	Mention enquiry, quote, product, date, outcome
Specificity	Concrete feels credible	Use exact problem / project / previous scope
Autonomy	People resist pressure	Give yes/no/not-now paths
Progress	Restarting is painful	Resume from prior step; do not make them start over
Loss aversion	Closing an open loop has value	Ask whether to close or keep open - never fake scarcity
Commitment ladder	Small commitments lead to bigger ones	Reply → answer question → book → attend → decide

THE COPY TEST

If the message could be sent unchanged to a stranger, it is not a reactivation message.

Earn the calendar link.

STAGE	CTA	WHEN TO USE
Lowest friction	Is this still relevant?	Cold/dormant database
Binary	Worth reopening - yes or no?	Old enquiry / lost lead
Short answer	Was it timing, scope, or solved elsewhere?	Quote / proposal
Micro-commitment	Want me to send the current options?	Some renewed interest
Scheduling	Would Tue 11:30 or Wed 15:00 suit?	Qualified + ready
Calendar	Here is the link	Only once booking intent exists

A common failure mode is asking a two-year-old lead to 'book a demo' before re-establishing relevance. Reopen first. Escalate second.

A simple 14-day recovery sequence.

DAY	CHANNEL	JOB	EXAMPLE
0	Email	Context + binary reopen	Still relevant?
1	Human reply/call	Respond to positives immediately	Pick up context
3	Email	Objection / alternate explanation	Timing, scope, solved?
5	Call / SMS*	High-intent only	Quick status check
8	Email	Value / proof / smaller next step	Want current options?
14	Email	Close loop	Should we close this?

*Only use SMS / electronic messaging where lawful and permitted for that contact.

STOP CONDITIONS

Stop the automation when they reply, opt out, book, enter an active opportunity, hard bounce, complain, or are manually suppressed.

Replies are where the money is made.

REPLY TYPE	ACTION	TARGET RESPONSE TIME
YES / interested	Human reply; qualify; propose next step	< 10 min during working hours
NOT NOW	Ask for timing date; schedule follow-up	Same day
SEND INFO	Send concise proof/options + one question	Same day
PRICE?	Give range/context or qualify scope	Same day
NO	Close politely; suppress if objection/opt-out	Immediate
WRONG PERSON	Ask who owns the problem	Same day
COMPLAINT	Stop sequence; human resolution	Immediate
OUT OF OFFICE	Reschedule after return date	Automated

SPEED RULE

A reactivated lead has already gone cold once. Do not let a positive reply sit until tomorrow.

Harvard Business Review's classic lead-response research found major qualification advantages for faster follow-up. The exact numbers are historical, but the operating lesson remains: speed after intent matters.

Qualify for a next decision, not for a form.

Five questions are usually enough

- 1. What are you trying to get done now?
- 2. What changed since you first looked at this?
- 3. What happens if nothing changes?
- 4. Who else needs to be involved in the decision?
- 5. What is the realistic timing for deciding / starting?

SIGNAL	HIGH INTENT	LOW INTENT
Problem	Specific, active, costly	Vague curiosity
Timing	Defined window	No timeline
Authority	Decision maker / clear process	No path to decision
Action	Shares data, books, asks commercial questions	Only requests generic info
Next step	Mutually agreed	Open-ended 'keep me posted'

QUALIFIED =

Clear problem + plausible fit + real timing + decision path + agreed next step. Budget matters, but budget alone is not qualification.

Run the reactivation call around the gap.

CALL STRUCTURE

1. CONTEXT — 'You originally came to us about [X]. What was happening then?'
2. CHANGE — 'What has changed since?'
3. CURRENT STATE — 'How are you handling it today?'
4. COST — 'What does that create in time, money, risk, or missed opportunity?'
5. DESIRED STATE — 'What would a good outcome look like?'
6. DECISION — 'What needs to be true for you to move ahead?'
7. NEXT STEP — 'Based on that, the next sensible step is [X].'

DO NOT RE-PITCH THE ORIGINAL DECK

The database gives context, not permission to assume nothing changed. Diagnose the current situation before proposing.

Make the proposal a decision document.

SECTION	WHAT TO SHOW
Problem	Their current state in their words
Outcome	Specific desired result
Scope	Exactly what is included / excluded
Plan	Milestones, owners, timing
Economics	Price, payment schedule, assumptions
Risk reversal	Relevant guarantee / proof / cancellation terms where appropriate
Decision	Signature / payment / start-date mechanism

PROPOSAL RULE

No proposal without a defined problem, decision process, and next meeting / decision date. Sending PDFs into silence is not a sales process.

Follow the decision, not the document.

FOLLOW-UP LANGUAGE

Same day: 'I've sent the proposal. The two things to check are [scope] and [commercial point]. We said we'd decide by [date].'

48 hours: 'What is the main thing stopping a yes or no right now?'

Decision date: 'Based on where we left it, should we move this into delivery, change the scope, or close it?'

When to change the deal

- Price objection with strong need → change scope or payment structure before discounting.
- Risk objection → add proof, references, pilot, milestone, or smaller commitment.
- Timing objection → define the actual dependency and schedule the exact re-open date.
- Authority objection → bring the missing stakeholder into the process.
- No urgency → quantify the cost of waiting; if there is none, do not manufacture urgency.

The dashboard that tells you what to fix.

METRIC	FORMULA	IF LOW, CHECK
Contactable rate	Contactable ÷ exported	Data hygiene / permissions
Delivery rate	Delivered ÷ sent	List health / sending setup
Positive reply rate	Positive replies ÷ delivered	Segment / copy / offer
Qualification rate	Qualified ÷ positive	Targeting / definition
Booking rate	Booked ÷ qualified	CTA / speed / availability
Show rate	Shows ÷ booked	Reminders / qualification
Opportunity rate	Opportunities ÷ shows	Fit / discovery
Close rate	Wins ÷ opportunities	Sales / proof / economics
Revenue per 1,000	Won revenue ÷ sent × 1,000	Total system quality
Time to first response	Reply timestamp - handoff	Routing / staffing

NORTH STAR

Revenue per 1,000 contactable leads, segmented by cohort. It forces marketing, data, qualification, and sales to work as one system.

Do not guess. Diagnose the bottleneck.

OBSERVATION	LIKELY PROBLEM	NEXT TEST
Low delivery	Bad / old data	Verify data; suppress bounces; fix sender setup
Good delivery, low replies	Wrong segment/message	Narrow segment; improve context/CTA
Replies mostly 'no'	Timing / relevance weak	Change cohort or trigger
Many 'send info'	CTA too early / vague	Ask one diagnostic question
Interest, few bookings	Friction / slow handoff	Offer two times; human response
Bookings, low shows	Weak commitment	Confirm agenda + reminders
Shows, low opportunities	Poor fit / qualification	Tighten score and criteria
Opportunities, low wins	Offer / proof / sales issue	Review calls and lost reasons

ITERATION RULE

Change one major variable at a time - segment, trigger, message, CTA, offer, or sales handling - so you can tell what actually improved.

What to test first.

PRIORITY	VARIABLE	EXAMPLE
1	Segment	Quotes <180d vs all leads
2	Trigger	Timing changed? vs still relevant?
3	CTA	Reply yes/no vs calendar link
4	Sender	Named owner vs generic brand
5	Proof	Case result vs no proof
6	Sequence timing	3-day vs 5-day follow-up
7	Offer	Full scope vs diagnostic/pilot

Do not spend your first week testing subject-line punctuation. The largest gains usually come from who you contact, why now, what you say, and what happens after they reply.

The human handoff must be designed before launch.

- ✓ Every positive reply gets an owner.
- ✓ Owner sees the original enquiry, campaign, notes, lost reason, and value.
- ✓ Owner responds from a named person, not a black-box automation.
- ✓ High-value / high-intent replies trigger a call task immediately.
- ✓ No answer after a positive reply enters a short human follow-up sequence.
- ✓ Every outcome is written back to the CRM using standard dispositions.
- ✓ Won / lost reasons feed the next segmentation cycle.

WITHOUT THIS

Reactivation can generate replies while producing little revenue. The campaign is only half of the product; the response operation is the other half.

30-day launch plan.

WEEK	OBJECTIVE	DELIVERABLE
1	Audit + clean	Export, suppressions, field map, segment inventory
2	Pilot	250-500 highest-value contactable leads; 1-2 campaigns
3	Scale winners	Expand winning segment; improve routing and sales handoff
4	Proof + systemise	Revenue report, lost reasons, case study, next cohorts

Pilot acceptance criteria

- No unresolved compliance/data questions.
- Campaign and segment have a clear commercial hypothesis.
- Named owner for replies.
- CRM disposition fields are ready.
- Reply SLA is agreed.
- A proposal / contract process exists before appointments are booked.

Before you press send.

DATA

- ✓ Suppression list applied
- ✓ Duplicates removed
- ✓ Contactability flag set
- ✓ Lost reason / source mapped

SEGMENT

- ✓ Single reason for prior intent
- ✓ Recency window defined
- ✓ Value / fit score applied
- ✓ High-value records manually checked

MESSAGE

- ✓ References real context
- ✓ One primary question
- ✓ Low-friction CTA
- ✓ No fake urgency / misleading claim

HANDOFF

- ✓ Reply owner named
- ✓ SLA agreed
- ✓ Calendar availability ready
- ✓ CRM disposition ready

SALES

- ✓ Qualification questions ready
- ✓ Proposal template ready
- ✓ Decision follow-up ready
- ✓ Contract / payment step ready

What Re-Leading actually does.

PHASE	WE DO	CLIENT GETS
1. Revenue inventory	Export + audit dormant demand	Clear addressable list
2. Prioritisation	Segment + score + suppress	Ranked recovery cohorts
3. Campaign build	Write triggers, sequences, routing rules	Campaigns ready to launch
4. Launch	Send controlled pilot	Real reply / booking data
5. Conversion	Route, qualify, recover no-shows	Qualified conversations
6. Revenue	Track opportunities and wins	Recovered revenue attribution
7. Scale	Expand winning cohorts	Repeatable recovery system

THE PROMISE TO MEASURE

We judge the system by qualified conversations, opportunities created, contracts signed, and revenue recovered - not vanity metrics.

Use evidence. Stay inside the rules.

Key sources

ICO — Guidance on direct marketing using electronic mail (updated 28 April 2026)

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/guidance-on-direct-marketing-using-electronic-mail/>

ICO — Electronic mail marketing / Guide to PECR

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/guide-to-pecr/electronic-and-telephone-marketing/electronic-mail-marketing/>

ICO — Direct marketing guidance

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/direct-marketing-guidance/>

Harvard Business Review — The Short Life of Online Sales Leads (2011)

<https://hbr.org/2011/03/the-short-life-of-online-sales-leads>

Baymard Institute — Cart Abandonment Rate Statistics 2026

<https://baymard.com/lists/cart-abandonment-rate>

IMPORTANT

Channel rules vary by geography, subscriber type, relationship, and how the data was collected. The campaign should have a documented contactability decision before launch. This playbook is not legal advice.