

AUTOMATE & RELAUNCH — BRING YOUR DEAD LEADS BACK TO LIFE ON AUTOPILOT

YOU DON'T NEED MORE EFFORT. YOU NEED A SYSTEM
THAT NEVER FORGETS TO FOLLOW UP.

AUTOMATE & RELAUNCH

INSTRUCTIONS:

By now, you've:

- ✓ Cleaned your cold list (Day 1)
- ✓ Built your revival offer (Day 2)
- ✓ Written your 5-message sequence (Day 3)

Now it's time to make it all run automatically.

This worksheet helps you:

1. Load your list into your CRM
2. Build the automation that sends your reactivation sequence
3. Track replies, opens, and booked calls
4. Relaunch this campaign every 90 days — without lifting a finger

By the end, you'll have a **fully automated re-engagement system** that revives old leads forever.

THE GUIDE:

STEP 1:

Choose Your Platform

Fill in the blank:
I'll be running my automation in _____.

Example: "GoHighLevel," "ActiveCampaign," or "HubSpot."

- ✓ Use what you already have. Don't overcomplicate it.

STEP 2:

Upload Your Revival List

- ✓ Import the contacts you tagged as "Re-Engagement Batch #1."

- ✓ Make sure fields include: Name, Email, Phone, Tag, Last Contact Date.

Fill in the blank:
Total contacts uploaded: _____

STEP 3:

Segment and Tag Properly

Fill in the blank:
Segment Name: _____
Tag: "Re-Engagement - [Month/Year]"

- ✓ Tagging lets you re-run this campaign every quarter without overlap.

STEP 4:

Create Your Workflow

Outline your flow before building it:

Trigger: "When contact tagged as Re-Engagement"

Step 1: Send Message 1 (Curious Check-In)

Step 2: Wait 1 day → Send Message 2 (Update & Offer)

Step 3: Wait 1 day → Send Message 3 (Proof)

Step 4: Wait 2 days → Send Message 4 (Value Drop)

Step 5: Wait 2 days → Send Message 5 (Last Call)

Fill in the blank:
I'll build this workflow inside _____.

STEP 5:

Tag by Lead Type

- ✓ Send Messages 1, 3, and 5 via text or DM.
- ✓ Send Messages 2 and 4 via email.

Fill in the blank:
My primary text tool is _____.
Example: "Twilio," "Salesmsg," or "GHL built-in SMS."

STEP 6:

Build Reply Notifications

- ✓ Add a step to notify you or your VA when a lead replies.

Fill in the blank:
Reply notification will go to _____.
Type of alert:

- ☐ SMS
☐ Email
☐ Slack

- ✓ Example: "Send Slack message to #sales when reply received."

STEP 7:

Add Call Booking Links

- ✓ Include your booking link (Calendly or GHL) in at least Messages 2 and 5.

Fill in the blank:
My booking link: _____.

- ✓ Test that it opens correctly from both mobile and desktop.

STEP 8:

Set Tracking Metrics

- ✓ Add these columns in your CRM or Google Sheet:
| Date | Contacts Sent | Replies | Calls Booked | Deals Closed | Notes |

Fill in the blank:
My goal for this campaign: _____ % reply rate and _____ booked calls.

STEP 9:

Test Everything

- ✓ Run a test with your own contact info.
- ✓ Confirm message timing, deliverability, and formatting.
- ✓ Check for typos or automation misfires.

Fill in the blank:
My first test lead received message #1 after _____ seconds.

- ✓ Fix any delays or errors before going live.

STEP 10:

Schedule Your Quarterly Relaunch

- ✓ Set a reminder in your calendar to re-tag cold leads every 90 days.
- ✓ Each quarter, clone this workflow and rename it (Batch #2, #3, etc.).

Fill in the blank:
My next re-engagement campaign will run on _____.

- ✓ Repetition = consistent pipeline without new ad spend.

Why It's Important:

Most solopreneurs lose money because they follow up once and move on. Automation doesn't just save time — it compounds effort. Every time this sequence runs, you're reactivating leads you already paid for. This is the secret to **consistent appointments without new ads**.

Need help cleaning and tagging your CRM before tomorrow's step? Book a free strategy session:

square1grp.com/brainstormsession

You've automated your Re-Engagement System.

Tomorrow, we'll bundle it all into **The Re-Engagement Playbook** — your master system for reviving dead leads and turning them into cashflow every quarter.