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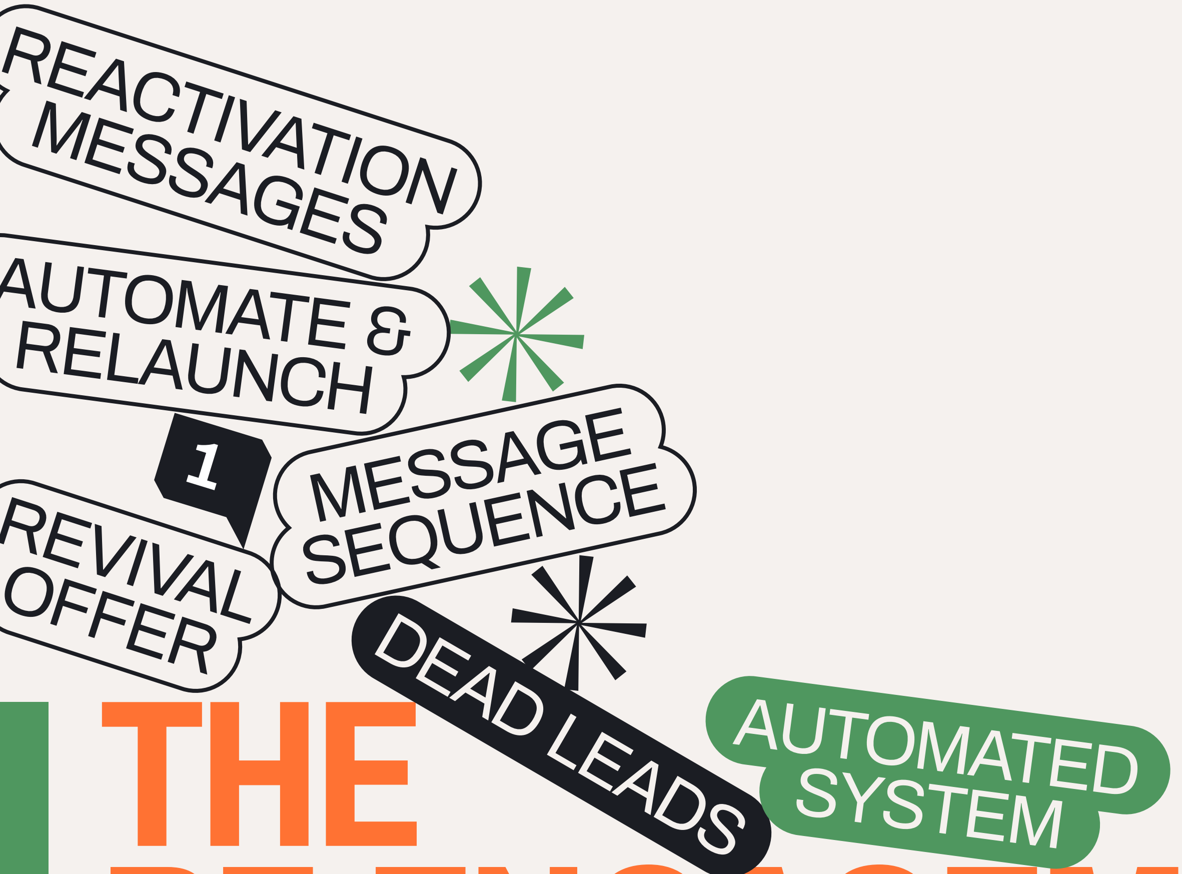

THE RE-ENGAGEMENT PLAYBOOK

Turn dead leads into new deals.

AUDIT YOUR DEAD LEADS — FIND THE HIDDEN MONEY IN YOUR LIST

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YOU ALREADY PAID FOR THOSE LEADS. THEY GHOSTED — NOT BECAUSE THEY WEREN'T INTERESTED, BUT BECAUSE LIFE GOT IN THE WAY. LET'S BRING 'EM BACK.

DEAD LEADS

INSTRUCTIONS:

Most founders think they need new leads when they're sitting on a goldmine of old ones. This worksheet helps you dig through your CRM, inbox, or spreadsheets to find:

- Contacts who ghosted before booking
- Past prospects who said "not now"
- Lost deals that went cold after follow-up

By the end, you'll have a clean, segmented list of people who already know you — the easiest group to re-engage and convert.

THE GUIDE:

STEP 1:
Locate Every Lead Source

Fill in the blank:
My leads come from ________.

Example: "Facebook ads, Calendly forms, and email inquiries."

- List every system that captures names — don't miss anything.

STEP 2:
Export Your Contacts

- Pull data from each source into one sheet.

Include: Name, Email, Phone, Status, Date of Last Contact.

Fill in the blank:
Total contacts exported: _____

STEP 3:
Filter Out Active Leads

- Remove anyone who's currently in your pipeline or booked a call recently.

These are your alive leads — we're focusing on the cold ones.

Fill in the blank:
After filtering, I have _____ cold leads left.

STEP 4:
Segment by Last Contact Date

Create buckets:

- ☐ 30–60 days cold
- ☐ 61–120 days cold
- ☐ 120 + days cold

Fill in the blank:
Most of my dead leads fall in the __________ range.

- This helps you prioritize who's still warm enough to revive.

STEP 5:
Tag by Lead Type

Add a column in your sheet:
Lead Type = Buyer / Seller / Client / Vendor / Referral.
(Adjust to your industry.)

Fill in the blank:
My primary lead types are __________.

- Later, your messages will be personalized per tag.

STEP 6:
Identify Why They Went Cold

Skim past messages or call notes. Mark each lead with a reason:

- ☐ Timing was off
- ☐ Budget issue
- ☐ Ghosted after proposal
- ☐ Went with someone else
- ☐ Unresponsive from day one

Fill in the blank:
The most common reason my leads went cold is __________.

STEP 7:
Flag the "Worth Reviving" Ones

Use this rule: If you believe there's a 10 % chance they'd say yes now, keep them.

- Tag those as "RE-ENGAGE."

Fill in the blank:
I flagged _____ leads to revive this week.

STEP 8:
Create a "Never Again" List

- Remove leads who were rude, bad fits, or time-wasters.

You don't want to pollute your data.

Fill in the blank:
I removed _____ leads that I'll never contact again.

STEP 9:
Clean Up Duplicates + Emails

- Deduplicate your list and verify emails/phone numbers.

A clean list = better deliverability when we email/text them later.

Fill in the blank:
My final revival list has _____ contacts.

STEP 10:
Save and Tag Inside CRM

Upload your clean list and tag them as: **"Re-Engagement Batch #1."**

- This is the segment you'll message for the rest of the week.

Why It's Important:

You can't revive what you can't see. Most founders have dozens — sometimes hundreds — of dormant leads who already know their name and brand. Once you clean and tag that list, you can send the right message at the right time… and watch dead leads come back to life.

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

square1grp.com/brainstormsession

You've got your revival list.

Tomorrow we'll craft your Revival Offer — the irresistible, low-friction incentive that gets those people to reply fast.

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BUILD YOUR REVIVAL OFFER — GIVE COLD LEADS A REASON TO WAKE UP

OLD LEADS DON'T NEED CONVINCING — THEY NEED A REASON TO RE-ENGAGE. LET'S GIVE THEM ONE THAT'S IMPOSSIBLE TO IGNORE.

REVIVAL OFFER

INSTRUCTIONS:

Yesterday, you built your revival list — the leads that ghosted, flaked, or just vanished. Today, we build the bait that gets them talking again. A "revival offer" isn't a discount — **it's a low-friction reason to reply**. It can be a:

- Free audit
- Quick win checklist
- Updated service or bonus
- Limited-slot consultation

By the end of this worksheet, you'll know exactly what you're offering and why it'll work.

THE GUIDE:

STEP 1:

Define the Goal of Your Revival

Fill in the blank:
The main thing I want from these old leads is to __________.

Example: "Book a call to re-evaluate their marketing."

- Keep it simple — the goal is a response, not a sale yet.

STEP 2:

Pick Your Offer Type

Choose one:

- ☐ Free audit ("Let's review what's changed since we last talked.")
- ☐ New bonus ("We added [benefit] for past clients — want the update?")
- ☐ Quick win resource ("New checklist to get [desirable result].")
- ☐ Priority access ("We opened 3 new client slots this month.")

Fill in the blank:
My revival offer will be _______.

STEP 3:

Anchor It to a Pain Point

Fill in the blank:
The problem my leads still have is __________.

Example: "They still don't have a predictable lead system."

- If it's the same pain they had before, the message will hit harder.

STEP 4:

Add an Update Angle

Make it fresh:
"We've made some big updates since we last talked…"
or "A lot's changed in the market — want me to walk you through what's working now?"

Fill in the blank:
The update angle I'll use is __________.

Example: "Our ads strategy now cuts costs by 40 %."

STEP 5:

Create Your Hook Line

Write the first sentence you'll send by text or email:

"Hey [first name], you probably don't remember me but we talked a while back about [problem]. Curious if you ever solved that?"

Fill in the blank:
My hook line will be: _________.

- Curiosity + familiarity = instant reply bait.

STEP 6:

Decide the Format

Fill in the blank:
I'll deliver my offer via _______.

Example: "15-minute audit call" or "PDF checklist."

- Low barrier offers get more responses.

STEP 7:

Add Scarcity or Urgency

Fill in the blank:
Only ___ spots/resources available until __________.

Example: "Only 5 audits available until Friday."

- Without urgency, old leads procrastinate again.

STEP 8:

Add a Soft CTA

Pick one that feels low pressure:

1. "Want me to send you the details?"
2. "Would you be open to a 15-minute review?"
3. "Can I send the new guide your way?"

Fill in the blank:
My CTA will be: __________.

STEP 9:

Write Your One-Line Revival Offer Statement

Combine everything into one sentence:

"Hey [first name], we've added a new [offer type] to help with [problem]. Only [scarcity]. Want me to send you the details?"

Fill in the blank:
My final revival offer is: ______.

STEP 10:

Validate Your Offer

Ask yourself:

1. Would I reply to this?
2. Is it simple enough to say yes in 3 seconds?
3. Does it feel like help, not a pitch?

Rate your offer on a scale of 1–10 for clarity. If it's under 8, simplify it.

Why It's Important:

You're not trying to "sell again." You're restarting a conversation. Old leads already trust you enough to have talked once — this offer reminds them why they should finish the job now.

Need help crafting or testing your revival offer in your CRM? Book a free strategy session:

square1grp.com/brainstormsession

You've built your revival offer.

Tomorrow, we'll write your 5-Message Reactivation Sequence — the exact texts and emails that wake these leads up and fill your calendar again.

WRITE YOUR REACTIVATION MESSAGES —

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WAKE UP YOUR LIST WITHOUT SOUNDING DESPERATE

YOU DON'T NEED TO BEG. YOU NEED TO START A CONVERSATION THAT FEELS REAL, RELEVANT, AND VALUABLE.

REACTIVATION MESSAGES

INSTRUCTIONS:

Yesterday you built your revival offer — today we give it a voice.

Most people blast one "we're back!" email and call it follow-up. That's lazy.
This worksheet walks you through writing a **5-message sequence** that re-engages old leads through conversation, curiosity, and small asks.

Your sequence will use a mix of **email + text (SMS or DM).**
Keep each message short — like something you'd actually send from your phone.

By the end, you'll have all 5 messages ready to drop into your CRM automation.

THE GUIDE:

STEP 1:

The "Curious Check-In"

Goal: Restart the conversation.
Tone: Friendly + low pressure.
Template: "Hey [first name], we chatted a while back about [problem]. Curious — did you ever get that sorted out or is it still on your list?"

Fill in the blank:
My first message will say: _____

- ✓ Send via SMS or email. It's personal and easy to answer.

STEP 2:

The "Update & Offer"

Goal: Deliver your revival offer from Day 2.
Template: "We've been helping a bunch of [avatar type] solve [problem]. Since we last spoke, we added [update or new benefit]. I'm offering a [revival offer] this week — want details?"

Fill in the blank:
My offer message will say: ____

- ✓ End with a question. That's your call-to-action.

STEP 3:

The "Social Proof Ping"

Goal: Build trust and curiosity.
Template: "Just helped a client who was in your exact spot get [short result]. Crazy what a few tweaks can do. Want me to show you what we did?"

Fill in the blank:
My proof message will say: ____

- ✓ Keep the story short and specific (1 sentence win only).

STEP 4:

The "Value Drop"

Goal: Deliver help without a pitch.
Template: "Here's something that's been working really well for [people like them]: [tip or strategy]. Try it — and if you want help implementing, let me know."

Fill in the blank:
My value drop will say: _______

- ✓ Position yourself as the authority, not the annoyance.

STEP 5:

The "Last Call"

Goal: Create urgency without pressure.
Template: "Hey [first name], closing out my [revival offer] today. If you'd like me to hold a spot or send details, shoot me a quick 'yes.' If not, no worries — I'll circle back next round."

Fill in the blank:
My final message will say: ____

- ✓ Give them a polite out. That's what makes the close feel respectful and authentic.

Optional Upgrades (Choose 1–2)

1. Add a **subject line for each email:**
   Example: "Still looking to [desired outcome]?" or "Quick question about [last conversation]"
2. Add an **image or loom video** in Message 4 if you want extra pattern interrupt.
3. Add a **short PS line** in each email to re-state the CTA.

Sequence Timing (Recommended)

Day	Message	Channel
Day 1	*Curious Check-In*	*Text or Email*
Day 2	*Update & Offer*	*Email*
Day 3	*Social Proof Ping*	*Text or Email*
Day 5	*Value Drop*	*Email*
Day 7	*Last Call*	*Text or Email*

- ✓ Spacing keeps you top-of-mind without being annoying.

Why It's Important:

Conversations create cashflow.
Every message here is designed to re-open a dialogue — not force a sale. When you send messages that sound like a human and help like a coach, you'll be shocked how many "dead" leads come back to life.

Need help installing your sequence into your automation software? Book a free strategy session:

square1grp.com/brainstormsession

You've written your reactivation sequence.

Tomorrow, we'll load these into your CRM, set up the timing, and automate your entire revival system so you can wake leads up without lifting a finger.

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

SQUARE 1 GROUP

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.

Thousands of leads. One problem: they've gone quiet.

Your "dead leads" are just dormant revenue. The Re-Engagement Playbook shows you how to revive them with a system that's simple, smart, and scalable. Audit → Offer → Message → Automate.

By the end, you'll have a plug-and-play reactivation engine that brings old prospects back — and keeps your pipeline full.

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