FREE GUIDE: REACTIVATION

Reconnect with inquiries that went quiet.

A step-by-step guide to following up with suitable past inquiries and restarting useful conversations, while respecting contact preferences and opt-outs.

Check consent first: not every historical record can be contacted. Rules such as the TCPA (for calls and texts) and CAN-SPAM (for email), along with state rules and your agency's own policies, may apply. This guide is general information, not legal advice. Check with your compliance lead or adviser before contacting past inquiries.

1 Decide which inquiries count as "gone quiet"

Start with a clear, limited definition, for example: people who contacted your agency in the past 12 months, asked about a service you offer, and did not book, buy or reply to your last message.

- Pick a time window your team is comfortable with.
- Start small, such as one month of past inquiries, so you can learn before doing more.

2 Choose eligible contacts and check contact preferences

Only contact people you have a valid reason and permission to contact, through a channel they agreed to.

- Check how each person contacted you and what they agreed to when they did.
- Check for any stated preference, such as "email only" or "please do not call".
- Use email for people who only gave consent for email. Only text or call people where your consent records and the applicable rules allow it.

3 Exclude opt-outs, complaints and inappropriate records

Remove these before you send anything:

- Anyone who unsubscribed, opted out or asked not to be contacted, on any channel.
- Anyone with an open or past complaint, unless your compliance lead approves contact.

- Records with missing or doubtful consent, wrong numbers, bounced emails or duplicates.
- Records where contact would be insensitive, for example after a bereavement, or where the person told you they arranged coverage elsewhere and did not want further contact.
- Numbers on the National Do Not Call Registry or your internal do-not-call list, where those rules apply to your calls or texts.

4 Separate past prospects from existing customers

A past prospect and an existing customer need different messages. Do not send a “we have not heard from you” message to someone who already buys from your agency.

- Match the list against your current customers and remove them.
- Handle existing customers through your normal service and review process instead.

5 Use a short, adaptable follow-up sequence

Keep it brief and respectful. A simple pattern you can adapt:

When	Channel	Purpose
Day 1	Email	Friendly check-in with a clear reply or booking option.
Day 4 or 5	Text, only with consent	Short reminder with the same option.
Day 10 to 14	Email	Final, polite message that closes the loop.

Then stop. Do not keep cycling the same people through the sequence.

6 Example messages

Replace the bracketed details and have your agency approve the wording before use. Do not mention prices, savings or coverage outcomes.

EMAIL 1

Subject: Following up on your inquiry

Hi [first name], this is [name] from [agency]. You contacted us in [month] about [topic]. I wanted to check whether you still have questions we can help with. If so, you can book a short call here: [booking link], or simply reply to this email.

If you would rather not hear from us, reply “stop” and we will update our records.

TEXT, ONLY WHERE YOU HAVE CONSENT

Hi [first name], it’s [name] at [agency]. Following up on your [topic] inquiry. Reply here or book a time: [link]. Reply STOP to opt out.

FINAL EMAIL

Subject: Closing your inquiry

Hi [first name], I have not heard back, so I will close your inquiry for now. If you would like to talk in future, you can book a time here: [booking link] or reply to this email. Thanks for considering [agency].

7 Give one clear booking or reply action

Every message should make the next step obvious: reply, or book a time. Test the booking link from a phone before you send, and make sure someone is ready to answer replies promptly.

8 Stop when someone replies, books or opts out

- When someone replies or books, remove them from the sequence and hand them to a named team member.
- When someone opts out, stop all messages on that channel immediately and record the request. Follow any opt-out timing your applicable rules require.
- If a reply raises a complaint, pass it to the right person rather than continuing the sequence.

9 Track responses without overstating results

Record how many people you contacted, how many replied, booked, attended and opted out. Then interpret carefully.

- Some people would have come back anyway, so not every appointment is extra business caused by the sequence.
- If you want a fairer comparison, hold back a small, similar group and compare what happens without messages.
- Watch opt-outs and complaints as closely as bookings. A rising opt-out rate is a sign to change the message or the list.

See how this could work for your agency.

In a 20-minute demo you can hear the virtual receptionist, see an inquiry captured and watch the next step.

Book a 20-minute demo: calendly.com/katiehoneychurch57/demo

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