

Retention & Reactivation

Win back the right clients.

Stop leaving money in your client list.

What We Cover Today

01

Why Retention Matters

The numbers that make ignoring your client list the most expensive mistake in your business

02

The Right Clients, The Right Work

Reactivation is not about chasing everyone — it's about winning back your ideal clients

03

The Reactivation Strategy

5 steps: ID, segment, offer, reach out, measure — with real examples across every trade

04

Dead Quotes Are Gold Too

How to reactivate unconverted quotes — a pipeline most businesses ignore completely

05

Your Action Plan

Leave with a message drafted and a send date locked in

Why Retention Is Your Fastest Path to Profit

5-7x

more expensive

to get a new client
than keep one

68%

leave due to

Perceived Indifference
not price, not quality

25-95%

profit increase

from just a 5% lift
in retention

67%

more spent

by repeat clients vs
first-time buyers

Why Do Good Clients Go Quiet?

1%

Die

3%

Move away

9%

Taken by a friend (competitor)

19%

Price or no longer need the
service

68%

**Perceived Indifference — they
felt ignored**

A 10% Lift in Retention = \$46,000 Difference

Same starting clients. Same average spend. One business just kept 10% more.

Company A — 60% Retention		
Year 1	100	\$100,000
Year 2	60	\$60,000
Year 3	36	\$36,000
Year 4	22	\$22,000
Year 5	13	\$13,000
TOTAL		\$231,000

Company B — 70% Retention		
Year 1	100	\$100,000
Year 2	70	\$70,000
Year 3	49	\$49,000
Year 4	34	\$34,000
Year 5	24	\$24,000
TOTAL		\$277,000

\$46,000 DIFFERENCE

Reactivation Is NOT About Chasing Everyone

✘ The Wrong Approach

- Blasting every past client regardless of fit
- Chasing price-shoppers who drained your time
- Reactivating slow-payers and problem clients
- Trying to win back clients who left for price — and always will
- Filling your schedule with the wrong work just to look busy

✔ The Right Approach

- Target your IDEAL past clients — right fit, right job type
- Clients who paid on time and valued your work
- Clients who gave you the type of work you WANT more of
- Clients in suburbs or sectors where you're already efficient
- Clients who referred others or left positive reviews

Right clients + right work = more profit per hour, less stress, better referrals.

Who Is Your Ideal Past Client?

Different businesses, same principle — know who you want back.

Plumber

Recurring maintenance clients in key suburbs. Avoided: one-off emergency calls from outside your zone.

Electrician

Resort and residential clients with ongoing electrical needs. Avoided: owner-builders who micromanage, slow-pay, and undervalue licensed expertise.

Builder

Clients with \$300K+ projects who trust your process. Avoided: scope-creep clients who always push price.

Bookkeeper

Monthly retainer clients who respect your advice. Avoided: one-off BAS clients who never act on it.

Physio / Vet

Clients who book follow-up appointments and refer friends. Avoided: no-show or discount-seeking clients.

Marketer

Regular retainer accounts. Avoided: one-off rush jobs with tight margins.

The 5-Step Reactivation Framework

1

ID Your Ideal Clients

Pull your past client list. Filter for right fit: job type, location, payment history, referral track record. These are your A-grade targets.

2

ID Who to Reactivate

Flag anyone inactive 6–18 months who fits your ideal profile. Separate: past clients vs unconverted quotes. Both are opportunities.

3

Choose Your Offer / Reason

\$value. Seasonal hook. Their birthday/anniversary. NPS survey. New service announcement. Introducing a rewards programme.

4

Choose Your Channel & Send

SMS — highest open rate (98%). Email — for longer value-first messages. Phone call — for A-grade past clients. Sequence: SMS → Email → Call.

5

Measure & Systemise

Track offers redeemed and names. Tools: GHL, Tap Mango, Five Stars (getapp.com). Build it into your follow-up system so it repeats.

Step 3: Choose Your Reason to Reach Out

Value

Builder: Pay your deposit by [date] and we'll guarantee project completion before [date]
Tradie: Book this month and we'll include a free [safety inspection / compliance check / smoke alarm test]

Their Birthday / Anniversary

Any business: 'Happy birthday [Name] — as one of our valued clients, here's a special offer just for you this month.'

Introduce Your Rewards Programme

Any business: 'We're launching a VIP Rewards Programme — as a past client, you qualify automatically. Here's what that means for you.'

Seasonal / Occasion Hook

Plumber: 'Heading into the wet season — have you had your hot water system checked?'
Vet: 'Annual heartworm check month — book this week and we'll include a free health snapshot.'

Survey / NPS — Ask for Feedback

Any Business: 'We'd love your feedback on your last job with us — takes 2 minutes and helps us improve. Here's a small thank-you for completing it.'

New Service Announcement

Electrician: 'We now offer EV charger installation — you mentioned this last time. We can quote while we're already in your area.'

Dead Dead - Quotes Are Gold

Most businesses write a quote, hear nothing, and move on. That's a buried goldmine.

Quote Sent

No Reply

Assumed Lost

Forgotten

The Reality:

Many unconverted quotes went quiet for a reason that has nothing to do with you — timing, budget month, another job came first. A personal follow-up 3,6 & 12 months later converts at surprising rates. These people already said yes in their heads — they just got distracted.

SMS — Quote Follow-Up

"Hey [Name], have you given up on your dream _____"

"Hey [Name], it's [Your Name] from [Business]. I sent you a quote for [job] a few weeks back — just checking if you'd had a chance to look it over? Happy to adjust or answer any questions. — [Name]"

Phone — Quote Follow-Up

"Hey [Name], [Your Name] here from [Business] — just a quick one. I sent over a quote for [job] and wanted to check in. Any questions I can answer? We've got a spot coming up that might suit your timing."

Step 4: Choose Your Channel — Then Follow Up


SMS

Open Rate

98%

Best for:

Warm past clients, A-grade reactivation, quote follow-ups

 *Keep under 160 characters. Use first name. One clear ask.*

Email

Open Rate

20–30%

Best for:

Longer value-add messages, seasonal offers, NPS surveys

 *Subject line is everything. Lead with their name and what you did last.*


Phone Call

Open Rate

Best

Best for:

Top 10–20 A-grade past clients only — personal, direct

 *30 seconds. Name, reason, one ask. Don't leave long voicemails.*

The Follow-Up Sequence — Fortune Is In The Follow-Up

Day 1
SMS

Day 3
Email

Day 7
Phone Call

Day 14
Final Email
+ expiry

The 'We've Missed You' Message — Copy & Adapt

SMS Template

Hey [First Name], it's [Your Name] from [Business]. It's been a while — we've got a gap in the schedule this week and thought of you. Any jobs on the radar? Happy to pop out for a look. — [Name]

The 'Shhh' Offer Script

Shhh, don't tell anyone but [Your Business] would like to offer you [X% or \$X off] your next [job/purchase] this month. This offer is just for you. Enjoy.

Email Template

Subject: We've been thinking about you, [First Name]

Hey [First Name],

Hope you and the family are going well. It's [Your Name] from [Business] — we did [brief reference] for you back in [month/year].

I wanted to reach out personally because we're running a [seasonal check / offer] for our past clients this month — and I wanted to make sure you didn't miss out.

[Describe your offer — specific and time-limited.]

Just reply or text me on [number]. We look after our people — and you've always been great to deal with.

Cheers, [Name]

What This Looks Like In Your Business

Builder 🏠

"Hey Dave, it's [Name] from [Business]. We completed your reno back in March — I know you mentioned the kitchen was next on the list. We've got a window coming up in July. Worth a chat?"

Electrician ⚡

"Hi [Name], we just finished a solar install two streets over and I thought of you — you mentioned solar last time. Want an updated quote?"

Vet 🐾

"Hi [Name], Bella is due for her annual check-up this month. We haven't seen her since [date] — we'd love to catch up. Book online or call us and mention this message for priority booking."

Plumber 🔧

"Hey [Name], winter's coming — have you had your hot water system checked this year? We're doing free 15-minute assessments for past clients this month. Want me to book you in?"

Marketing 📊

Hey [Name], Google just changed the rules again — AI search is rewriting who gets found and who disappears. We haven't spoken since [date] and I'd hate for your business to be invisible. Can I do a free 5-minute AI visibility check on your business this week?

Baker / Marketer 🍰

"Hey [Name], we haven't worked together since [project/order] — we've got some new products / packages that I think would suit you perfectly. Can I send you a quick overview?"

Your 48-Hour Action Plan — Complete This Now

REACTIVATION — Past Clients

The ONE past client I'm reaching out to first: _____

Last job/project we did together: _____

My reach-out channel (SMS / Email / Call): _____

My personalised opening line: _____

REACTIVATION — Dead Quotes

One unconverted quote I'll follow up this week: _____

The offer or reason I'll give: _____

Channel & date I will send: _____

MY COMMITMENT

I will send my first reactivation message by: _____ / _____ / _____

I will follow up on _____ **unconverted quotes by:** _____ / _____ / _____

Key Takeaways

- 1 68% of clients leave due to Perceived Indifference — not price. Fix the indifference.
- 2 Reactivation is about the RIGHT clients — right job type, right values, right fit.
- 3 Dead quotes are a pipeline. Follow them up within 3, 6 & 12 months with a personal message.
- 4 The 'We've Missed You' message works. Personalise it, send it, follow up 4 times.
- 5 5–7× cheaper to retain or reactivate than acquire new — invest your energy accordingly.
- 6 One message. One action. This week. That's how this compounds.