Bring back past clients automatically

> *“Clients come in once or twice and then drift away, and I don't have time to personally reach out to hundreds of people.”*

Category: lead-management	**Setup Time:** ~45 minutes	**Estimated Hours Saved:** 2 hrs/week	**Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Create a 'win-back' email automation that automatically emails any client who hasn't booked an appointment in the last 6 months. It costs significantly less to re-engage an old client than to acquire a new one. A simple, personal-sounding email checking in and offering an easy way to book a touch-up or check-in appointment will reliably convert a percentage of your dormant list into active revenue every month.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Mailchimp: (Free Tier / Wholesale)**
- **Klaviyo: (Free Tier / Wholesale)**
- **Booking System CRM: (paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Segment your audience**
   Create a rule in your email tool for 'Last Appointment Date is more than 180 days ago'.

2. **Write the email**
   'Hi [Name], we realized it's been a while since we saw you! Just checking in to see how everything is going. If you're due for a visit, you can grab a spot here: [Link].'

3. **Automate the trigger**
   Set the campaign to send automatically whenever a contact meets the 180-day criteria.

4. **Monitor replies**
   Ensure replies go to an inbox you actually check, as some will write back directly.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Should I include a discount?

A: You can, but test it without one first. Often, people just forgot to book and only needed the reminder.

Q: Which email CRM tools allow free automatic win-back email sequences?

A: Mailchimp and ActiveCampaign allow simple single-step automated email triggers, while MailerLite or HubSpot Free allow entry-level drip campaigns for inactive clients.