THE REACTIVATION CAMPAIGN

WAKE UP YOUR OLD LIST



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HIGHLEVEL GUIDES · VOLUME 03 · PILLAR 01

WAKE UP YOUR OLD LIST **AND LET AI BOOK THE REPLIES.**

Most businesses sit on a list of people who asked about them once and went quiet. This build pulls those contacts into a Smart List, sends them a paced text message, and hands every reply to a Conversation AI agent that answers questions and books the appointment. At the end you will have a campaign running on its own with a results screen you can check each morning.

5	37	90 min
PARTS	STEPS	TO BUILD

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WHAT YOU ARE BUILDING

WHAT YOU ARE BUILDING **AND WHAT IT DOES FOR THE BUSINESS.**

The finished system takes the contacts the business already owns, filters out anyone who is active or on Do Not Disturb, and sends them an opening text in small batches over several days. When a contact replies, a Conversation AI agent set to Autopilot takes over the thread, answers the common questions, and books the appointment on the calendar. Every send, skip and error shows up on the Bulk Actions page, so you can see what the campaign did without opening a single conversation.

- A Smart List that refreshes itself with dormant contacts who are safe to text
- A Conversation AI agent in Autopilot that answers replies and books appointments
- An outbound opening message sent from an approved SMS number
- A drip schedule that sends in batches inside your business hours
- A statistics view with Initiated, Completed, Skipped and Error counts you can download

BEFORE YOU START

BEFORE YOU START, **HAVE THESE READY.**

Gather these first and the campaign runs without a stop.

- A subaccount with contacts already imported, and confirmation that those contacts consented to hear from you
- A user login with settings access, because you cannot manage Smart Lists without it
- An SMS sending number that is eligible for outbound messaging
- A calendar the AI agent can book into
- Conversations AI, Outbound enabled in Labs
- A short list of the questions dormant contacts usually ask, so you can write the agent prompt
- A small test group of five to ten contacts you control

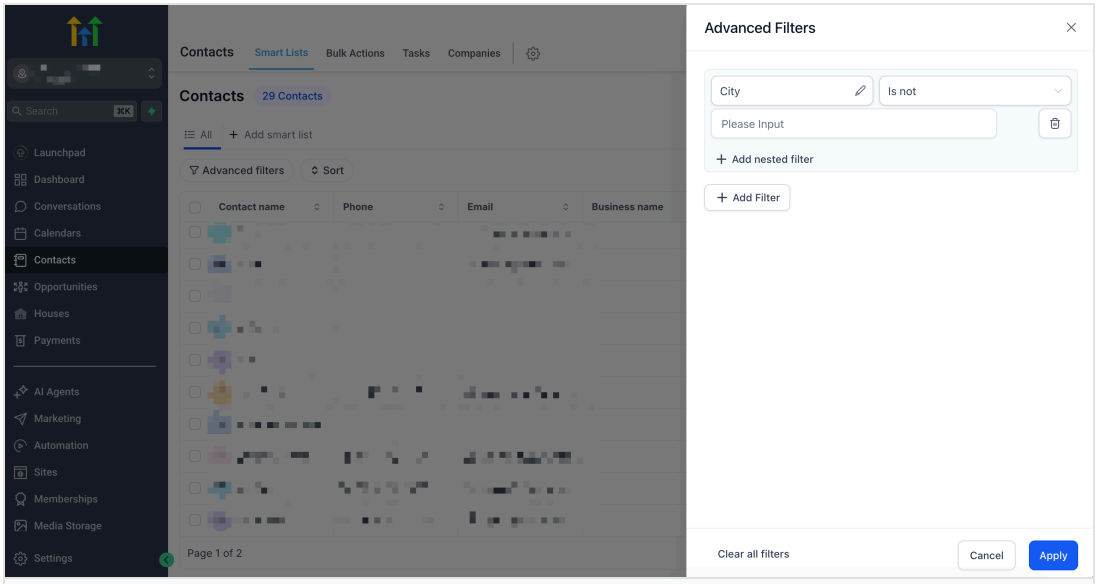
Build the list first, then the agent, then outbound. The campaign screen asks for the Smart List and the agent by name, so both need to exist before you open it. **Do not start the campaign until the agent has passed a test in Suggestive mode.**

PART 01 OF 05

01 BUILD THE SMART LIST OF CONTACTS WHO WENT QUIET.

A Smart List is a dynamic list that updates itself as contact data changes. You set the filters once and HighLevel keeps the list current, so the campaign always pulls the right people. This part builds a list of contacts with no recent appointment who are not on Do Not Disturb.

01 Go to **Contacts**, then **Contacts/Smart Lists**, and click **+ Add smart list**.



Advanced Filters let you combine a date filter with a DND filter in one list.

02 Click **Advanced Filters**.

03 Search for the **Last Appointment** field and select it.

04 Choose a date operator for the timeframe that counts as dormant for this business and enter the value.

05 Click **+ Add Nested Filter**, search for the **DND** filter, and set it so only contacts with Do Not Disturb disabled for SMS stay on the list.

06 Click **+ Add Nested Filter** again if you want to narrow by a tag, pipeline stage or custom field, then click **Apply**.

07 Click **Create** at the bottom of the screen and give the list a clear name such as Reactivation.

08 Use the contacts per page selector at the bottom right and choose **100** so you can scan the list quickly.

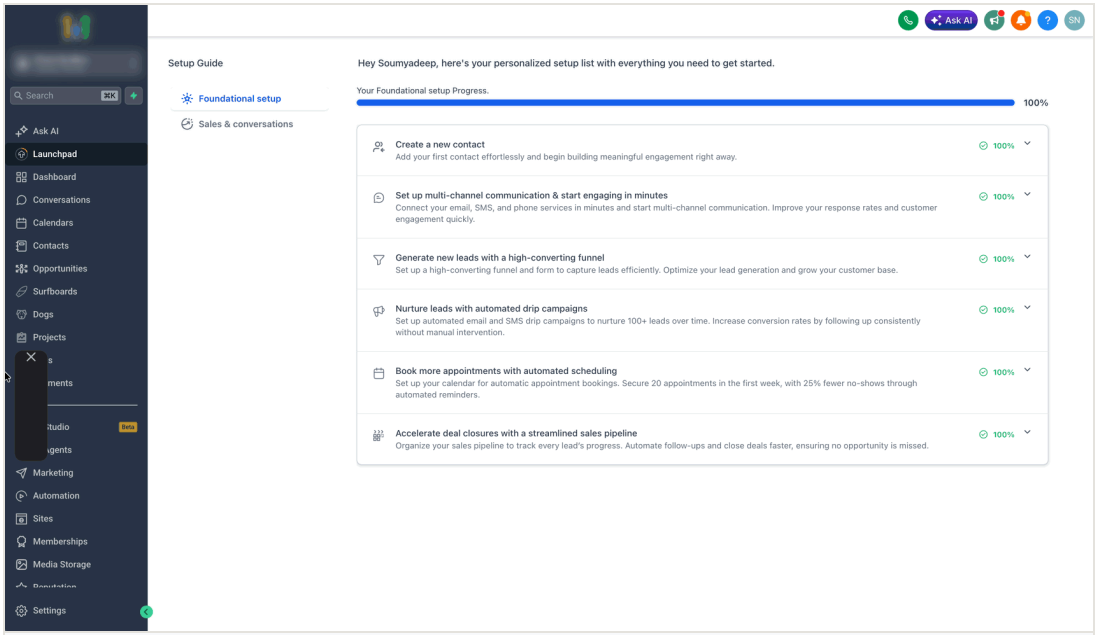
i Contacts cannot be added to a Smart List by hand. If someone is missing, fix the contact record so it matches the filters and the list will pick them up.

PART 02 OF 05

02 CREATE THE AGENT **THAT ANSWERS AND BOOKS.**

The agent is the part of this build that does the talking. It needs a job, a voice, a calendar and a status before it can handle a single reply. Guided Form Setup is the fastest path for an appointment booking agent.

01 Go to **AI Agents**, then **Conversation AI**, and click **+ Create Bot**.



Guided Form Setup covers appointment booking without writing a long prompt.

02 Select **Guided Form Setup** and click **Create New Bot**.

03 Choose **Appointment Booking** as the bot type.

04 Select or create a **Brand Voice** so replies sound like the business.

05 Configure **Bot Settings**, including the SMS channel the agent will answer on.

06 Configure **Bot Goals** with the appointment calendar the agent should book into and the details it should collect.

07 Add the common questions from your dormant contacts and the answers under **Bot Training**.

08 Save the bot and set its status to **Suggestive** for now.

i New bots may be set to Off by default. A bot that is Off never replies, so check the status every time you save.

PART 03 OF 05

03 TURN ON OUTBOUND AND WRITE THE OPENING MESSAGE.

By default a Conversation AI agent only answers people who message first. Outbound mode lets it start the conversation. This part switches that on, picks the sending number and sets the first text your dormant contacts will see.

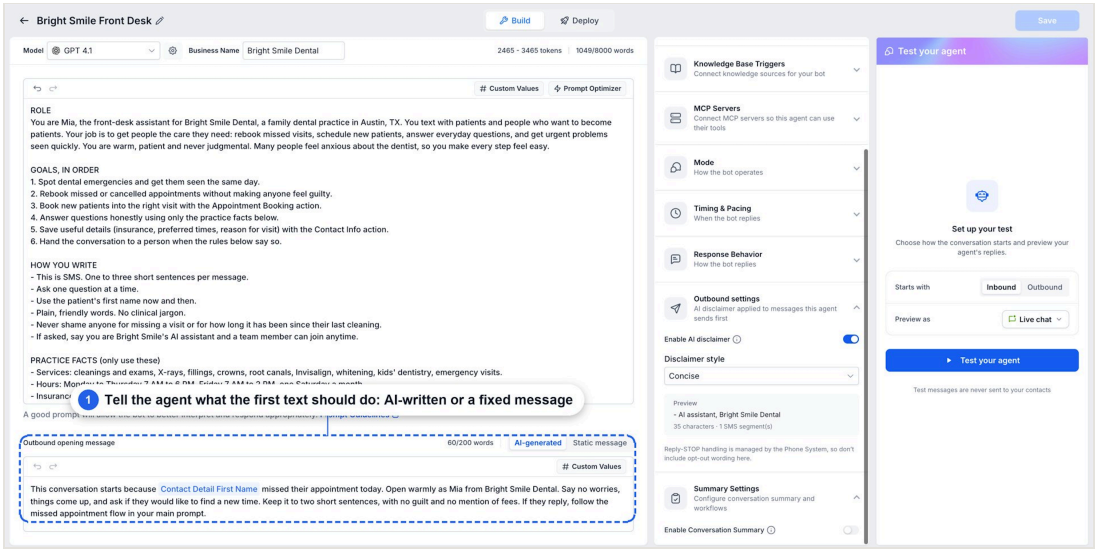
01 Enable **Conversations AI, Outbound** in **Labs** if it is not already on.

02 Go to **AI Agents**, then **Conversation AI**, and open the agent you just built.

03 Configure the **Outbound opening message**, choosing either an AI generated opening that uses contact data or a static message.

04 Set the agent to **Autopilot** so it runs the conversation without a team member approving each reply.

05 Go to **Deploy**, then **Outbound**, then **Channels & activation**.



Outbound needs an eligible SMS number and a completed compliance confirmation.

06 Select an eligible SMS sending number and complete the compliance confirmation.

07 Save the agent's configuration.

i An AI disclaimer in the first message does not replace consent, sender identification, opt out handling or the other SMS requirements. Keep those in place.

PART 04 OF 05

04 LAUNCH THE CAMPAIGN **IN SMALL BATCHES.**

The AI campaign screen ties the list, the agent and the schedule together. Drip mode sends in batches instead of one giant blast, which protects the sending number and keeps replies arriving at a pace the agent and your team can handle.

01 Go to **Contacts**, open the Contacts list, and click **AI Campaign**.

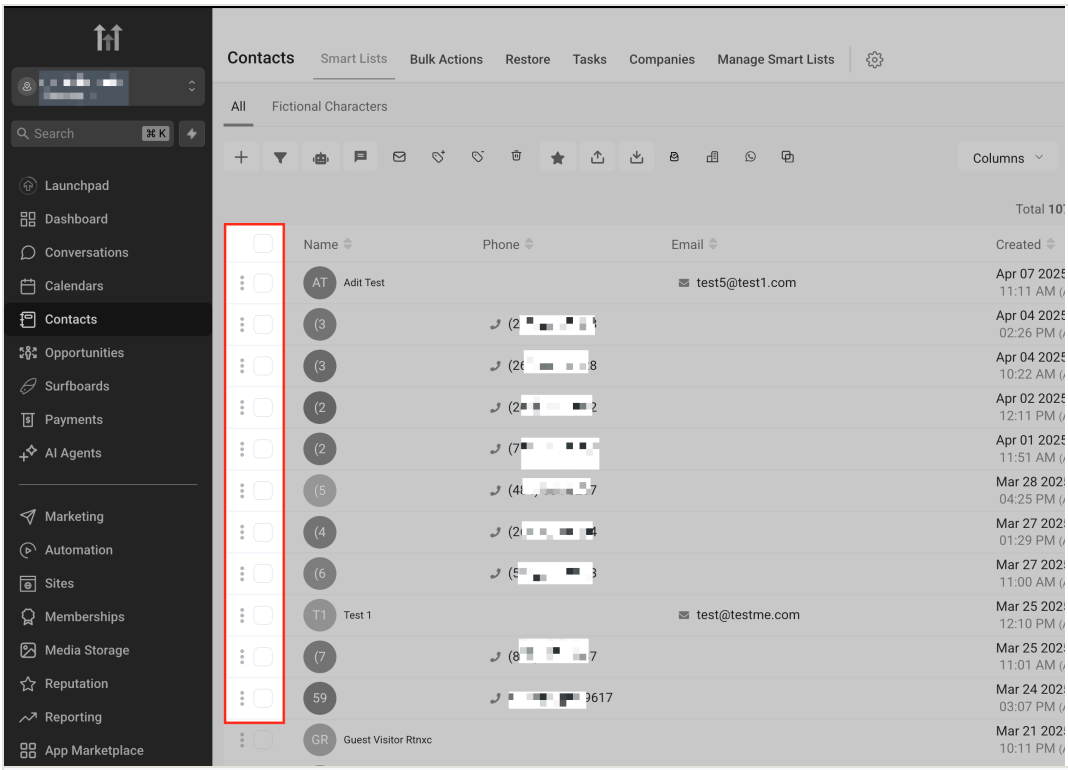
02 Choose **Smart list** and select the Reactivation list you built.

03 Enter a **Campaign name**.

04 Select **SMS** as the **Channel** and choose your Conversation AI Agent.

05 Enable **Assign this agent when a contact replies**.

06 Under sending mode choose **Send in drip mode**, then set the batch quantity, the repeat after interval, the days messages can go out and the daily sending window.



Batch quantity, repeat after and the sending window control the pace of the campaign.

07 Review the audience, the opening message, the reply handling settings and the schedule, then click **Start campaign**.

i If you would rather send a plain text with no agent, go to **Contacts**, then **Bulk Actions**, choose **Send SMS**, pick the Smart List and set **Delivery Method** to **Send in Drip Mode**. The same batch, interval and sending window controls apply.

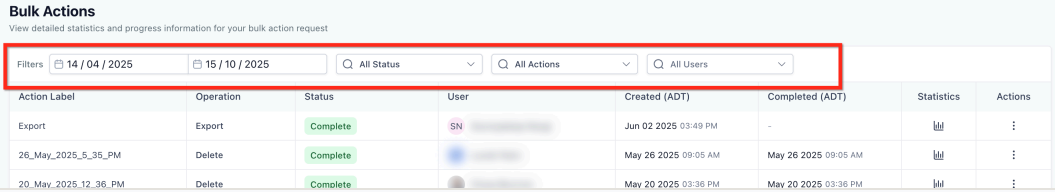
PART 05 OF 05

05 TRACK THE RESULTS **AND FIX WHAT SKIPPED.**

The Bulk Actions page lists every mass operation started from Contacts, including AI campaigns. It shows what the campaign did at the contact level, so you can spot errors early and pause the campaign if something looks wrong.

01 Go to **Contacts**, then **Bulk Actions**.

02 Use the filters for **Status**, **Action Type**, **User** or **Date** to locate the AI campaign.



Every campaign shows up here as a row with its own statistics view.

03 Open **Statistics** on the campaign row.

04 Review the **Initiated**, **Completed**, **Skipped** and **Error** counts.

05 Check individual messages for skipped actions or errors.

06 Click **Download** to export the results if you need the per record failure reasons.

07 If the campaign needs to stop, open the three dot menu on the row and select **Pause**, **Edit** or **Cancel**.

i A Completed status does not by itself confirm the message was delivered, that the contact replied, or that an appointment was booked. Check the conversation and the calendar for the real outcome.

TEST IT

TEST IT
BEFORE THE FULL LIST GOES OUT.

Run the whole system on a handful of contacts you control before you point it at the real list.

01 Build a second Smart List filtered to your five to ten test contacts and open the campaign with that list selected.

02 Start the campaign in drip mode with a batch quantity of one and a short repeat interval, then watch for the opening text on your own phone.

03 Reply with a common question and confirm the agent answers within its wait time without a team member touching the thread.

04 Reply with a request to book and confirm the agent offers times from the right calendar and a booked appointment appears on it.

05 Reply with an unknown question and confirm the agent handles it the way your prompt describes.

06 Go to **Contacts**, then **Bulk Actions**, open **Statistics** on the test campaign and confirm Initiated and Completed match the number of test contacts with zero errors.

07 Turn on Do Not Disturb for one test contact, run the test again, and confirm that contact is skipped.

WHEN A STEP FAILS

IF IT DOES NOT WORK, **CHECK THESE FIRST.**

These are the issues that come up most often with this build.

The agent never replies after a contact texts back

Check the bot status and set it to Suggestive or Autopilot. Then confirm the agent is connected to the SMS channel and that Assign this agent when a contact replies is enabled on the campaign.

Contacts you expected are missing from the Smart List

Contacts are added only when they match the filter conditions. Open Advanced Filters, review each filter and fix the contact record instead of trying to add the contact by hand.

Messages stop going out partway through the day

Drip mode defers any message that falls outside the Process Between window or goes to a DND contact. They are sent in the next valid batch, so widen the window if you need faster delivery.

You cannot pause or cancel the campaign

Pause and Cancel are limited to eligible job types such as queued bulk SMS. Check the Action Type on the Bulk Actions row to confirm the job supports those controls.

You cannot see or edit the Smart List

Users cannot manage Smart Lists without settings access. Ask the account admin to grant it, or have them share the list with admins from Manage Smart List.

Completed counts look good but nobody is booking

Completed only means the action ran. Open the conversations, read what the agent said, and improve the prompt and training. Prompt quality directly affects results.

FROM THE FIELD

MICHAEL'S **TAKE.**



Michael Reimer

FOUNDER OF CRM PROS · HIGHLEVEL COMMANDER

If I were running this for a business today, I would spend the first hour on the list, not the message. The list decides who gets texted, and a sloppy filter means you text people who booked last week or people who asked you to stop. Build the Smart List with the date filter and the DND filter together, scroll through it at 100 per page, and read the names. If the list looks right, everything after it gets easier.

Where people go wrong is assuming the agent will handle replies because it exists. It will not. The bot has to be on Autopilot, attached to the SMS channel, and assigned to the campaign. Miss any one of those and replies land in the inbox with nobody answering. I run the whole thing on a few of my own numbers first, in drip mode with a batch of one, and I reply like an annoyed customer to see what the agent does.

This build pays off for any business with more than a few hundred contacts and a calendar that has gaps. The contacts already know the business, which is why the open and reply rates on reactivation are nothing like a cold list. Pace it with drip mode so your team is not buried in replies on day one, check Bulk Actions each morning, and keep improving the prompt based on the conversations you read.

GO DEEPER

THE FEATURES **BEHIND THIS BUILD.**

Every feature this guide touches has its own page in the library, with the settings, limits and Michael's notes.

CONTACTS

How to Create & Manage Smart Lists

CONTACTS

Bulk actions for contacts & smartlists in HighLevel

CONTACTS

Drip mode for bulk actions: Schedule high volume outreach in HighLevel

AI EMPLOYEE

Creating and managing Conversation AI campaigns in HighLevel

CONTACTS

Advanced Filters in Smart Lists

MEMBERSHIPS & COMMUNITIES

How to use the Groups filter in HighLevel Smart Lists

AI EMPLOYEE

How to Set Up a Conversation AI Bot