



READINESS CHECKLIST

Database Reactivation Readiness Checklist

Ten checks to run before you contact old leads or past customers.

A companion to the article *Database Reactivation Readiness Audit for Contractors*.

WHAT DATABASE REACTIVATION MEANS

Database reactivation is the process of reviewing people already in a business's customer list, or CRM, identifying who has a real and relevant reason to hear from the business, and restarting appropriate conversations that may lead to booked work.

It is not one generic message sent to every contact. Each person you reach out to should have a clear reason to hear from you.

A large database is not automatically a campaign-ready database.

Why AI makes this practical now

Reviewing a few dozen records by hand is doable. Once a database holds hundreds or thousands of mixed records (past customers, stalled estimates, old inquiries, duplicates), doing it manually gets slow and difficult to manage accurately and consistently at scale. AI can help:

- Organize records
- Identify missing or conflicting information
- Find useful customer history
- Support approved customer grouping
- Prepare and manage approved follow-up
- Recognize routine replies
- Stop sequences at the appropriate time
- Route interested contacts
- Escalate exceptions to a person

People stay responsible. A person establishes eligibility, approves each campaign, reviews exceptions, handles sensitive conversations, and defines the stop rules.

Three possible decisions for every check

PASS

The available evidence supports proceeding with a controlled test.

HOLD

A specific question, missing record, or operational issue must be resolved first.

FAIL

The contact, customer group, channel, or campaign should not move forward in its current form.

Score one customer group at a time, and do not average the results. One Fail means the campaign does not move forward in its current form, even when every other check passes.

Checks 1 to 5: the records and the rules

1 Business objective

What single result do you want from this campaign?

PASS

One measurable goal is set, such as booked tune-ups or revived estimates.

HOLD

The goal is broad or mixes outcomes. Pick one before writing a message.

FAIL

There is no clear goal, or the only goal is to send something to the list.

2 Trace the relationship

Can you show why each person is in your database?

PASS

Each record ties to a real job, estimate, service request, or inquiry.

HOLD

Some records lack a source or date. Review them before grouping.

FAIL

The source is unknown, or the list was bought with no real relationship.

3 Identity and duplicates

Is each person in the database once, with the right name, number, and email?

PASS

Duplicates are merged, and contact details match the job history.

HOLD

A known set of records still needs matching or cleanup.

FAIL

Conflicting records could reach the wrong person, or the same person twice.

4 Channel eligibility

Do you have documented grounds to reach this person by text, email, or phone?

PASS

The record documents why this contact is eligible for this specific channel. A past job or CRM entry alone is not enough.

HOLD

Permission or status is unclear for some contacts. Hold them until confirmed.

FAIL

The contact does not qualify for this channel. Change channel or leave them out.

5 Suppressions and do-not-contact status

Are opt-outs and do-not-contact requests applied before anything is sent?

PASS

Opt-outs, do-not-contact requests, complaints, and disputes are all excluded.

HOLD

A suppression source is missing or not yet matched to the list.

FAIL

Someone who asked not to be contacted would still get the campaign.

Checks 6 to 10: the message and the people

6 Open work and recent conversations

Is anyone on the list already talking with your team?

PASS

Open jobs, active estimates, and recent service talks are excluded or routed.

HOLD

Status is unclear for some contacts. Check with sales or service first.

FAIL

The campaign would interrupt or contradict work already in progress.

7 Relevant reason to reconnect

Why would this customer group want to hear from you now?

PASS

Service history, timing, or a stalled estimate gives a real reason.

HOLD

The reason is plausible, but the records do not back it up yet.

FAIL

The message would be generic or unrelated to the past relationship.

8 Offer fit and capacity

Can you deliver what you offer if people say yes?

PASS

The offer fits this customer group, and the schedule has room for the work.

HOLD

Pricing, scope, timing, or crew capacity still needs confirmation.

FAIL

The offer cannot be delivered as written, or there is no room for the work.

9 Replies, exceptions, and human escalation

Who handles replies, questions, complaints, and unusual cases?

PASS

A named person owns replies, with response targets and a clear handoff.

HOLD

There is a gap in coverage, routing, or handoff.

FAIL

Nobody owns replies or exceptions during the send window.

10 Measurement and stop rules

Will you know when to continue, pause, or stop?

PASS

Bookings, revenue, opt-outs, and complaints are tracked, and stop rules are written.

HOLD

Tracking or a stop threshold still needs a final decision.

FAIL

Only sends are tracked, or there is no plan for when to stop.

Campaign decision worksheet

Fill out one sheet per customer group. Mark one decision per check, and write down the evidence or the next action.

CUSTOMER GROUP		BATCH SIZE		REVIEWED BY		DATE
#	Readiness check	Pass	Hold	Fail	Evidence or next action	
1	Business objective	☐	☐	☐		
2	Trace the relationship	☐	☐	☐		
3	Identity and duplicates	☐	☐	☐		
4	Channel eligibility	☐	☐	☐		
5	Suppressions and do-not-contact status	☐	☐	☐		
6	Open work and recent conversations	☐	☐	☐		
7	Relevant reason to reconnect	☐	☐	☐		
8	Offer fit and capacity	☐	☐	☐		
9	Replies, exceptions, and human escalation	☐	☐	☐		
10	Measurement and stop rules	☐	☐	☐		

Overall campaign verdict ☐ Pass ☐ Hold ☐ Fail

One Fail means the campaign does not move forward. Do not average the checks.

- ☐ The initial customer group and batch size are defined
- ☐ A named person is available during the send window
- ☐ Stop rules are understood before launch

What usually kills a reactivation campaign

■ One generic message to everyone	People can tell it was not written for them. Replies stay low and opt-outs go up.
■ Duplicate or mismatched records	The wrong person gets the message, or the right person gets it twice.
■ Ignored opt-outs or do-not-contact requests	You contact people who already asked you to stop, and trust takes the hit.
■ Unresolved complaints or active disputes	A cheerful offer lands on someone who is still upset with you.
■ Conflicts with open sales or service work	The customer hears two different stories from the same business.
■ Full database launched with no test	Every mistake gets repeated across the whole list before anyone catches it.
■ Nobody available to handle replies	Interested people wait, cool off, and book someone else.
■ Tracking sends, not results	Without bookings, revenue, opt-outs, and complaints, you cannot tell if it worked.

A safer next step

A readiness audit does not guarantee campaign results. It helps you make a responsible decision about:

- Who should be contacted
- Why the outreach is relevant
- Which channel is appropriate
- How replies will be handled
- When the campaign should pause or stop

Start with one small customer group. Review replies, bookings, opt-outs, and complaints before you expand.

We build and manage database reactivation for home service businesses, from review and customer grouping through messaging, reply handling, and booking.

They hand you a tool. We run it for you.

Book a Call

bizking.ai/book-call

Important: Contact and consent requirements can vary by channel, message type, technology, customer relationship, and location. This checklist provides operational information, not legal advice. Confirm the requirements that apply to your campaign before sending. Updated October 4, 2026.