

Forex Client Reactivation Campaign Blueprint

Step-by-step blueprint for a forex client reactivation campaign: list, segments, messaging, AI call flow, compliance gates and measurement.

WHO IT IS FOR

Retention, sales and ops leads at forex and CFD brokerages planning their first or next dormant client reactivation campaign.

TIME TO COMPLETE

90 minutes across two sessions

This blueprint takes a brokerage from an untouched dormant book to a measured reactivation campaign. It covers the seven decisions that decide whether the campaign pays: which accounts to call, how to split them, what to say to each group, how the AI call runs, which compliance gates it passes, how you launch, and what you measure. Work through it once with your ops lead, your compliance officer and whoever owns the CRM, and you'll have a campaign plan you can hand to any calling team, AI or human.

1 Choose who you call

A reactivation campaign is only as good as the list behind it. Start with a tight definition of dormant and a pull you can reproduce next month.

☐ Define dormant in trading terms, not marketing terms

Pick one rule and write it down: no trade in 90 days, or a balance above zero with no login in 60 days. Whoever pulls the list next quarter should get the same accounts.

☐ Pull the book from MT4/MT5 and the CRM, then reconcile

The platform knows last trade, balance and equity. The CRM knows phone, language, consent and owner. Join on account ID and flag every record that only exists in one system.

☐ Drop accounts that can't be called

Remove closed accounts, accounts in a dispute or chargeback, blocked or banned clients, anyone with an open complaint, and any number on your internal do-not-call list.

☐ Verify phone numbers before you pay to dial them

Normalise to E.164, remove duplicates across accounts, and mark numbers that failed on the last campaign. A high wrong-number rate is a list problem, not a calling problem.

☐ Check consent status per record, per channel

Marketing consent for email doesn't cover a call in most regimes. Store the consent basis you'll rely on next to each phone number so the compliance review in section 5 has something to sign.

☐ Set the campaign size before you set the goal

Count the callable records left after suppression. That number, not the size of the raw book, is the base for every rate you calculate later.

☐ Snapshot the list and freeze it

Export the final list with a date and a version. Retries, follow-ups and results all key back to this snapshot so you can explain any number a month later.

2 Split the book into segments that get different calls

One script for the whole dormant book wastes the best accounts and annoys the rest. Four or five segments are enough for a first campaign.

☐ Add a value tier inside each segment

Lifetime deposits or past trading volume decides the order within a segment. Call high-tier accounts first so early results come from the accounts that matter.

☐ Tag language and country on every record

The AI agent can run the call in the trader's own language, but only if the record says which one. Country also decides the calling hours and the rules in section 5.

☐ Assign an owner per segment

The person who takes handoffs and answers callbacks. Segments without an owner shouldn't be called.

☐ Write one sentence per segment stating what a successful call produces

For funded-but-idle it might be a logged intent to trade this week. For withdrew-and-left it might be a documented reason and permission to follow up. Section 7 measures against these sentences.

SEGMENT	HOW TO IDENTIFY	WHAT THEY PROBABLY NEED	CALL PRIORITY
Funded but idle	Balance above your threshold, no trade in the dormant window	A reason to trade again: a market they follow, a platform change, a personal check-in	First
Withdrew and left	Balance at or near zero after a withdrawal, account still open	A conversation about why they left before any offer	Second
Deposited once, never traded	One deposit, zero closed trades, often stuck at platform setup	Help getting set up: platform login, first order, a short walkthrough	Second
Registered, never deposited	Account created, zero deposits, KYC complete or pending	A reason to fund and one clear step, or a KYC completion nudge if still pending	Third
Old leads with no account	CRM contact, no platform record	Treat as new prospects under the stricter consent rules that apply	Last, or exclude

3 Write the message for each segment

Traders hang up on pitches and stay on for relevance. Every segment gets its own opening line, its own reason for the call, and its own next step.

☐ Lead with why you're calling, in the first two sentences

Name the brokerage, say the account has been quiet, and give the real reason for the call. Traders who feel tricked into a conversation don't reactivate.

☐ Reference something true about their account

Last trade month, the instrument they traded most, or that they still hold a balance. Keep it to facts the trader would expect you to know; nothing that reads like surveillance.

☐ Pick one offer per segment, or none

A reactivation offer is optional and must pass the financial promotion review in section 5. A check-in call with no offer often does better with funded accounts than a bonus does.

☐ Draft the three most likely objections and the response to each

Lost money, no time, and moved to another broker cover most calls. Write each response as a question that keeps the conversation open, not a rebuttal.

☐ State the next step in plain terms

Log in today, book a call with a named account manager, receive a link by SMS, or be removed from future calls. Every call ends on one of these.

☐ Write the voicemail and the SMS follow-up alongside the script

Both are shorter versions of the same message with the same next step. They carry the same disclosures as the live call.

☐ Translate, then have a native speaker read it aloud

Topcalls runs calls in up to 78 languages, but a script translated word for word from English sounds like one. Local phrasing for money, risk and time matters here.

4 Design the AI call flow

Map the call as branches before anyone picks a voice or writes agent instructions. The flow below is the skeleton; your segments fill in the words.

☐ Open with identity, disclosure and permission

The agent says who it's calling on behalf of, that it's an AI assistant where required, and asks whether now is a good time. A no here becomes a scheduled callback, not a lost call.

☐ Confirm you're speaking to the account holder

First name and one soft check are enough. Never read out balances, deposits or account numbers before that confirmation.

☐ **Branch on the segment reason, then on the trader's answer**

Funded-but-idle asks what's kept them away. Withdrew-and-left asks what changed. Each answer routes to a response you wrote in section 3, or to a handoff.

☐ **Define the handoff triggers**

Any complaint, any question about regulation or the safety of funds, a request for a specific person, a mention of financial distress, or a stated wish to close the account goes to a human. Write the exact transfer wording.

☐ **Define the exit paths**

Interested and logged, callback booked, remove me, wrong number, voicemail, no answer. Each maps to one CRM disposition so the report in section 7 needs no manual coding.

☐ **Set the retry rule per outcome**

No answer might retry twice at different times of day. Voicemail gets one more attempt. Remove-me gets zero, ever. Write these into the campaign settings, not into a note.

☐ **Decide what the agent may never say**

No performance predictions, no guaranteed returns, no pressure on timing, no comment on the trader's past losses beyond acknowledging them. Put these in the agent instructions as hard rules.

☐ **Run 20 test calls to your own team before launch**

Two per segment, in every language you'll use, including the objections and the handoff. Listen for latency, interruptions and any line that sounds like a pitch.

5 Pass the compliance gates before dialing

These are review items, not legal conclusions. Each one needs a named sign-off from your compliance officer or counsel before the campaign goes live.

☐ **Confirm the consent basis for calling each segment**

GDPR territories need a lawful basis for the call and for processing the recording. Existing clients and cold leads usually sit under different bases; document which applies to which segment and confirm it with your compliance officer.

☐ **Screen against national and internal do-not-call lists**

For US numbers, TCPA and the national DNC registry apply; other countries run their own registries. Run the screen against the frozen list in section 1, then again on the day of dialing.

☐ **Review every offer and script line as a financial promotion**

In the UK the FCA's financial promotion rules govern what an outbound call may say about trading; MiFID II conduct rules shape the same in the EU. Compliance signs the scripts, the voicemail and the SMS as well as the campaign idea.

☐ **Decide the AI disclosure wording per market**

Some markets require the caller to state that the voice is automated or AI-generated. Get the wording from compliance or counsel and use it verbatim in the opening.

☐ **Set the recording notice and the retention period**

State that the call is recorded where required, and decide how long recordings and transcripts live and who can access them. Match the retention rule you already apply to human calls.

☐ **Restrict calling hours by the trader's country, not your office**

Use the timezone on the record. A call at a legal hour in your office can be an unlawful hour in the trader's.

☐ **Log the sign-off**

Name, role, date, and the script version approved. If the script changes after this, the gate reopens.

6 Pilot, then scale

Run a small batch first. At \$0.35 per minute it costs little, and it tells you whether the list, the segments and the script hold up before you spend the whole budget.

☐ **Pick a pilot batch from one segment and one language**

Enough records to get a readable answer rate, small enough that a script problem is cheap. Highest-value segment first.

☐ **Set the daily cap and the concurrency**

Cap the calls per day so the handoff owner can take every transfer. Raise it only after the first day's transfers were all answered.

☐ **Sit in on the first hour**

Ops lead, compliance and the segment owner listen live to the first calls. Stop the batch if a disclosure is missing or a handoff fails.

☐ **Review the first 20 completed calls the same day**

Read the transcripts, listen to three recordings per outcome, and check that every disposition landed in the CRM under the right account.

☐ **Fix the script before adding volume**

One change per batch so you know what moved the result. Update the section 3 and 4 items in place, then get them re-signed under section 5.

☐ **Scale segment by segment**

Add the next segment only when the previous one holds its target rate over two consecutive days. Add languages the same way.

☐ **Set the stop rules in advance**

A wrong-number rate, a complaint count, or a handoff no-answer rate that pauses the campaign on its own. Write the thresholds here: ____ / ____ / ____.

7 Measure what the campaign produced

Report the numbers below from the CRM, keyed to the list snapshot in section 1. Every rate uses callable records or answered calls as its base, never the raw book.

☐ Report by segment and by language, never only in total

The total hides the segment that's failing. A funded-but-idle list can carry a whole campaign while the old-leads list burns minutes.

☐ Compare 30-day reactivation against a held-back control group

Hold back a slice of each segment and don't call it. The gap between called and held-back accounts is the effect the campaign had; the raw reactivation rate alone isn't.

☐ Compute the revenue side with your own numbers

Average monthly revenue per active trader in that segment x reactivated accounts. The dormant trader revenue calculator at topcalls.ai/dormant-trader-revenue-calculator takes the same inputs if you want a second run.

☐ Close the loop into the next list pull

Wrong numbers, accounts that asked for removal, and the reasons traders gave all go back into the CRM before the next snapshot.

METRIC	FORMULA	WHERE IT COMES FROM
Reach rate	Answered calls / callable records	Call platform dispositions
Conversation rate	Calls that passed the identity check and reached the segment branch / answered calls	Call transcripts, agent flow tags
Positive outcome rate	Calls ending in interested, logged in, or callback booked / answered calls	CRM disposition
Handoff answer rate	Handoffs picked up by a human / handoffs attempted	Call platform transfer log
Reactivation rate	Accounts with a trade or deposit within 30 days of the call / callable records	MT4/MT5 activity report joined to the list snapshot
Cost per reactivated trader	Total call minutes x \$0.35, plus any offer cost, / reactivated accounts	Call platform billing, offer ledger
Remove-me rate	Opt-out requests / answered calls	CRM disposition, DNC log
Complaint count	Complaints that reference the campaign	Compliance log

How to use this playbook

1. Print it and work through sections 1 and 2 with whoever owns the CRM and the trading platform export.
2. Write the messaging and call flow in sections 3 and 4 with the segment owners, one document per segment.
3. Take the scripts and the frozen list to compliance for the section 5 sign-offs before any test call.
4. Run the pilot in section 6, then fill the section 7 table from the CRM at day 7 and day 30.
5. Keep the completed blueprint as the campaign record; the next campaign starts by editing it, not from a blank page.

Book a 30-minute call with a Topcalls co-founder

We size your dormant book, map the CRM and platform flow, and scope a pilot you could have live within about two weeks.

topcalls.ai/book