

Reactivation Campaign Metrics Template

12-metric measurement template for forex reactivation campaigns: definition, formula, data source, review cadence, owner and target for each one.

WHO IT IS FOR

Retention, ops and finance leads at forex and CFD brokerages who need to report on an AI or human reactivation campaign

TIME TO COMPLETE

40 minutes

This template pins down the 12 numbers a brokerage needs to judge a dormant trader reactivation campaign, from the first dial to the money that came back. Each metric gets a definition, a formula, the system it's pulled from, how often it's reviewed, who owns it and a blank for the target you commit to before launch. Filled in, it's the one sheet your retention lead, finance and compliance all read the same way, and the reason the weekly review takes twenty minutes instead of an argument.

1 Campaign scope and baseline

Every metric below is a ratio, and a ratio is only as honest as its denominator. Fix the list size, the dates and the attribution rules here before anyone quotes a number.

☐ Campaign name, matching the CRM and the calling platform

One label everywhere. If the CRM says 'Q3 dormant' and the dialer says 'Reactivation A', someone will spend an afternoon reconciling exports.

Name: _____

☐ Dormant segments in scope and their definition

Write the rule, not the nickname: 'no trade in 90 to 365 days, account open, balance any'. Segment is the first thing you'll cut every metric by.

Segments: _____

☐ Accounts in the list after suppression

Count after opt-outs, DNC matches, frozen accounts and excluded jurisdictions are removed. This is the denominator for reach metrics.

_____ accounts

☐ Campaign start and end dates

An always-on campaign still needs reporting periods. Pick a start date and a review date so the numbers are comparable week to week.

From _____ / _____ to _____ / _____

☐ **Baseline: what the same segments did in the 90 days before calling**

Pull redeposits, logins and trades for the same accounts with no outreach. Without this, every reactivation gets credited to the campaign, including the ones that would've come back anyway.

Baseline reactivation rate: _____ %

☐ **Attribution window after the last call**

How many days after a call does a deposit or trade still count as campaign-driven? Pick one window, write it down, and use the same one for every segment.

_____ days

☐ **Reporting currency and exchange rate rule**

Multi-entity brokers book deposits in several currencies. Name the reporting currency and whether you convert at deposit date or at month end.

Currency: _____ **Rate rule:** _____

2 Reach metrics (1 to 4)

Did the calls get to the right people, and did they talk? These move first and tell you within days whether the list and the call windows are any good.

☐ **1. Connect rate**

Share of dial attempts that reached a live person or a voicemail you count as reached. Decide now whether voicemail counts; most teams keep it separate.

Target: _____ **% Actual:** _____ %

☐ **2. Right-party contact rate**

Share of answered calls where the person on the line was the trader on the account. A low number usually means old phone data, not a bad agent.

Target: _____ **% Actual:** _____ %

☐ **3. Conversation rate**

Share of right-party contacts that turned into a real exchange. Set the talk-time threshold with your team (for example 45 seconds) and keep it fixed for the whole campaign.

Threshold: _____ **sec Target:** _____ %

☐ **4. Speed to first call**

Median hours from the moment an account entered the list (or a trigger like a failed deposit fired) to the first dial. For triggered follow-ups, measure in minutes.

Target: _____ **hrs Actual:** _____ hrs

METRIC	FORMULA	DATA SOURCE	REVIEW CADENCE	OWNER
1. Connect rate	Answered calls / dial attempts	Calling platform call log	Daily during launch week, then weekly	Campaign owner

METRIC	FORMULA	DATA SOURCE	REVIEW CADENCE	OWNER
2. Right-party contact rate	Calls where the account holder was confirmed / answered calls	Call outcomes tagged by the agent, checked against CRM	Weekly	Campaign owner
3. Conversation rate	Calls over your talk-time threshold / right-party contacts	Call duration and transcript from the calling platform	Weekly	Retention lead
4. Speed to first call	Time from list upload (or trigger event) to first dial attempt, per account	Calling platform timestamps vs CRM trigger timestamps	Daily for triggered campaigns, weekly for list campaigns	Ops lead

3 Conversion metrics (5 to 8)

What happened after the conversation. These need the CRM and the trading platform as well as the dialer, so agree on the join key (account ID, not phone number) before launch.

☐ 5. Positive outcome rate

Define the outcome tags before launch: 'will fund', 'wants callback', 'KYC help needed', 'not interested', 'do not call again'. If the agent can choose freely, the number means nothing.

Target: _____ % Actual: _____ %

☐ 6. Human handoff rate

Track two numbers: how often the agent hands off, and how often the human actually picks up or keeps the booked slot. A high handoff rate with low acceptance means the desk is the bottleneck, not the calls.

Handoff: _____ % Accepted: _____ %

☐ 7. Reactivation rate

Pick the action that counts as 'back' for this campaign: a login, a trade, or a trade above a minimum size. Report it against reached accounts, and separately against the whole list, so both the campaign owner and the CFO get the version they need.

Counts as reactivated: _____ Target: _____ %

☐ 8. Redeposit rate and average first redeposit

Share of reached accounts that funded, and the median first deposit size. Median, not mean; one whale hides a campaign that isn't working for everyone else.

Rate: _____ % Median deposit: _____

METRIC	FORMULA	DATA SOURCE	REVIEW CADENCE	OWNER
5. Positive outcome rate	Calls ending in an agreed next step / conversations	Call outcome tags from the calling platform	Weekly	Retention lead

METRIC	FORMULA	DATA SOURCE	REVIEW CADENCE	OWNER
6. Human handoff rate	Calls transferred or booked to an account manager / conversations; and handoffs accepted / handoffs offered	Calling platform transfer log plus account manager calendar	Weekly	Sales desk manager
7. Reactivation rate	Accounts that logged in or placed a trade within the attribution window / accounts reached	MT4/MT5 or trading platform activity export joined to call log on account ID	Weekly, final at window close	Retention lead
8. Redeposit rate	Accounts that deposited within the attribution window / accounts reached	Payments or cashier system joined on account ID	Weekly, final at window close	Finance

4 Cost and return metrics (9 to 12)

The four numbers finance will ask about. All of them are arithmetic on your own inputs; the only external number is the per-minute rate you pay for calling. Topcalls charges \$0.35 per minute all-inclusive, billed by the second, so calling cost is simply billed minutes times that rate.

☐ 9. Cost per conversation

Billed minutes times the per-minute rate, divided by conversations over the threshold. Unanswered dials and short calls still cost seconds, so this catches a bad list faster than connect rate alone.

Target: _____ Actual: _____

☐ 10. Cost per reactivated trader

Include the humans: account manager time on handoffs, the analyst who built the list, any offer cost. Calling minutes are usually the smallest line.

Target: _____ Actual: _____

☐ 11. Recovered deposits per reactivated trader

Deposits are cash, not revenue. Report them because the CEO will ask, but don't call the campaign paid back until metric 12 says so.

Actual: _____

☐ 12. Campaign payback multiple

Net revenue the reactivated accounts produced inside the window, divided by everything the campaign cost. Below 1.0 the campaign lost money in the window; decide before launch what multiple justifies running it again.

Continue above: _____ x Actual: _____ x

METRIC	FORMULA	DATA SOURCE	REVIEW CADENCE	OWNER
9. Cost per conversation	Total calling cost / conversations	Calling platform invoice or usage report; conversation count from metric 3	Weekly	Ops lead
10. Cost per reactivated trader	Total campaign cost (calling plus list prep plus human follow-up time) / reactivated accounts	Invoice, timesheets, metric 7	Weekly, final at window close	Finance
11. Recovered deposits per reactivated trader	Sum of deposits inside the attribution window / reactivated accounts	Payments system joined on account ID	Monthly, final at window close	Finance
12. Campaign payback multiple	Net revenue from reactivated accounts in the window / total campaign cost	Trading revenue (spread and commission) per account from the back office, metric 10	Monthly, final at window close	Finance

5 Guardrails to review alongside the 12

These don't decide whether the campaign worked. They decide whether it's allowed to keep running. Compliance owns the thresholds; the campaign owner reports against them.

☐ Opt-out requests per 100 conversations

Count every 'don't call me again', spoken or via any channel, and confirm each one landed in the suppression list within your agreed turnaround.

Stop above: _____ per 100

☐ Complaints received, by type

Split by 'didn't consent', 'wrong person', 'tone or pressure', 'other'. One complaint about pressure is worth more attention than ten wrong numbers.

Stop above: _____ in _____ days

☐ Calls placed to numbers that should have been suppressed

Re-run the DNC and opt-out match against the actual dialed list every week. The target is zero; anything above zero needs a root cause and a note for your compliance officer.

Actual: _____

☐ Calls outside permitted hours for the trader's location

Check against the trader's country of residence, not the phone prefix. Confirm the permitted windows per jurisdiction with your compliance officer or counsel.

Actual: _____

☐ **AI disclosure delivered on every conversation**

Sample transcripts weekly and confirm the agent identified itself as automated where your jurisdictions require it. Record who reviewed the sample.

Sample size: _____ **Reviewed by:** _____

6 Review cadence and sign-off

Who looks at what, when, and what decision they're allowed to make in that meeting. Fill in the names; a review with no decision owner turns into a status update.

☐ **Weekly review owner and meeting slot**

Owner: _____ **Slot:** _____

☐ **Where the numbers live**

One sheet or dashboard, one link. If the calling platform, the CRM and finance each keep their own, the weekly review starts with reconciling instead of deciding.

Link: _____

☐ **Sign-off on the final report**

Three signatures: the campaign owner for the operational numbers, finance for 10 to 12, compliance for the guardrails.

Ops: _____ **Finance:** _____ **Compliance:** _____

CADENCE	METRICS ON THE TABLE	WHO ATTENDS	DECISION THEY CAN MAKE
Daily, launch week only	1, 4, and the guardrails	Campaign owner, ops lead	Pause a segment, change call windows, fix the list
Weekly	1 to 10 plus guardrails	Campaign owner, retention lead, sales desk manager, compliance	Drop or add a segment, change the opening line, adjust handoff routing, stop the campaign
Monthly	7, 8, 11, 12	Retention lead, finance	Approve budget for the next period, change the attribution window for the next campaign
End of attribution window	All 12, final	Campaign owner, finance, compliance, head of retention	Run again, scale, or shelve; record what changes next time

How to use this template

1. Fill in section 1 before launch. If you can't name the list size after suppression or the attribution window, you're not ready to report.
2. Agree on the target column for all 12 metrics with retention, finance and compliance, and keep the targets fixed for the whole campaign.
3. Build the data pulls once: calling platform export, CRM export, trading platform activity, payments. Join on account ID.
4. Run the daily reads in launch week, then move to the weekly review in section 6 and record every decision next to the number that drove it.
5. At the end of the attribution window, fill in the final actuals, get the three sign-offs, and copy the sheet as the baseline for the next campaign.

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

We size your dormant book, map which of these 12 metrics your CRM and trading platform can already feed, and scope a pilot with targets agreed up front.

topcalls.ai/book