The Seen to Seated Method

FREE GUIDE U.S. EDITION

Reactivation Campaigns

Reconnect with people who previously inquired and patients who have not returned, while staying within the rules.

For U.S. healthcare practices.

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A note from the founder

Your practice already has valuable contact lists: people who inquired but didn't schedule an appointment, and patients who haven't been back for a while. These lists often sit unused in a spreadsheet or database that no one likes using. Practice owners may also worry about whether they're allowed to contact past patients, what they should say, and whether anyone will pay attention.

I'd bet it's easier to reconnect with a patient who had a good experience than to attract a brand-new patient. And those who inquired before? Yes, they may have chosen another practice... or maybe they got busy or nervous, or went elsewhere and had a poor experience. You don't know until you reach out.

This approach is called a reactivation campaign. Done carelessly, it can annoy people and break privacy and marketing rules. For people who still want help and whom you are allowed to contact, a useful reminder can be welcome.

This guide walks you through the steps for planning a reactivation campaign.

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Before you begin

Not legal advice. This guide provides general information for U.S. healthcare practices. It does not provide legal, regulatory, or clinical advice. Check applicable federal and state requirements, professional board rules, and platform policies before use, and seek qualified advice when needed.

1 Start with who you are allowed to contact

A past inquiry or appointment does not create permanent permission to contact someone on every channel. Check permission for each person, channel, and purpose before anyone is added to a campaign.

- **Texts:** for promotional texts, make documented written opt-in your practice's operating standard. Legal consent requirements depend on the technology, the content, and applicable law. A2P 10DLC registration or toll-free verification does not establish consent.
- **Permission records:** keep records showing the practice, the number, the date, the source, the disclosure wording, and the permitted purpose.
- **Email:** commercial email needs accurate sender details and subject lines, required advertising identification, a valid physical mailing address, and a working unsubscribe method. See the FTC CAN-SPAM guide.
- **Calls:** screen applicable national, state, and practice-specific Do Not Call lists unless a reviewed exception applies. Schedule outbound marketing within permitted hours at the recipient's location; state restrictions may be tighter than federal limits. An AI-generated outbound voice is subject to applicable artificial-voice calling rules. See the FTC Telemarketing Sales Rule guide.
- **Service or promotion:** treat service reminders and promotional campaigns separately. Being a healthcare practice does not create a blanket exemption, and a personal tone or a manually sent message does not automatically exempt a communication from applicable requirements.

Patient privacy: permission to receive texts or emails is separate from any HIPAA authorization needed to use or disclose protected health information. HIPAA distinguishes marketing from certain treatment and healthcare communications, so don't label every patient communication as marketing. Read the HHS guidance on marketing. **If you can't show why you are allowed to contact someone on a particular channel, leave them out.**

How to run a reactivation campaign

Segment

Create two lists: people who inquired but didn't schedule, and people who have been patients before. Include only contacts eligible for the chosen channel.

Message

Send one approved text or email through an allowed channel that gives people a reason to come back.

Sequence

If there's no reply and permission continues, follow up within the applicable rules. Some people miss messages or emails.

Convert

Help interested respondents schedule an appointment. Handle declines and opt-outs separately.

2 Clean and segment your list

- [ ] Remove anyone who has opted out, asked not to be contacted, or complained about contact.
- [ ] Remove duplicates, out-of-date details, and anyone you know has moved away.
- [ ] Separate past inquiries from lapsed patients, as they need different messages.
- [ ] Group past inquiries by the treatment or service they asked about.
- [ ] Group lapsed patients by how long it has been since their last visit or since a review was due.
- [ ] Record the channel and purpose each person agreed to, and use only that channel.

Key tips

- Use genuine, relevant reasons to reconnect, such as a health awareness month or your practice's anniversary.
- The aim is just to get a reply, so make replying easy ("Reply YES").
- Send personal messages, not newsletters.
- Keep replies short and human-sounding, then send the scheduling link.
- Run it every month. It can make sense to start with reactivation before paid ads, as these people already know your practice.
- Work out your numbers first: price per appointment × number of appointments, then choose a planning assumption for how many lapsed patients might return.

Opportunity example

HYPOTHETICAL EXAMPLE

What is one patient worth to you? Multiply the price per appointment by the number of appointments a typical patient has. For instance, if an appointment costs $70 and a patient attends three times for a course of treatment, that's $210 per patient. For a higher-value treatment course totaling $700, each returning patient is worth $700.

How much could your list bring in? This hypothetical example uses a 10% return rate as a planning assumption. It is not a forecast or a guaranteed return rate.

Eligible inactive patients	Returning patients: 10% example	Gross revenue at $210 per patient	Gross revenue at $700 per patient
500	50	**$10,500**	**$35,000**
1,000	100	**$21,000**	**$70,000**
2,000	200	**$42,000**	**$140,000**

All figures are potential gross revenue before costs, cancellations, or refunds. Substitute your own eligible list size, return rate, and appointment value to work out your own figure.

3 Write and approve your messages first

Every message should be checked and approved by the practice before it is sent. Good reactivation messages are short, personal, and useful.

- Say clearly who you are and why you are getting in touch.
- Refer to what they were interested in without including sensitive health details in the message itself. Texts and emails can be seen by other people.
- Give people a genuine reason to reconnect. If you include an offer, have it approved before sending.
- Offer one clear next step, such as scheduling a consultation.
- Include a simple way to opt out in every marketing message, and make sure it works.
- Avoid pressure or anything that could make someone feel uncomfortable about their appearance or health.

An example text

> Hi [Name], this is [Your name] at [Practice name]. Would you like help scheduling an appointment? Reply YES and we'll help you find a time. Reply STOP to opt out of marketing texts.

Use this example only when you have the required permission for the recipient, channel, and campaign. A YES reply requests the offered next step; it does not automatically authorize unrelated future marketing.

Adapting it for email? Commercial email also needs accurate sender details and subject lines, required advertising identification, a valid physical mailing address, and a working unsubscribe method.

4 Keep offers within the rules

Offers can help, but healthcare marketing must stay honest and professional. Your messages must follow federal and state advertising rules and the rules of the boards that license your team.

U.S. rules to check

State licensing boards	Each profession is licensed and regulated by the state, and many boards set their own advertising rules. Check the rules of every board that licenses members of your team.
FTC	Advertising must be truthful and supported, and testimonials and endorsements need appropriate disclosures. See the FTC Health Products Compliance Guidance and Endorsement Guides FAQs.
HIPAA and state privacy laws	Where your practice is a covered entity, HIPAA applies alongside applicable state privacy laws. See the HHS guidance on marketing.
FDA	Prescription-drug and device promotion needs separate review. See the FDA OPDP FAQs.
Campaign communications	FCC/TCPA, FTC/CAN-SPAM, applicable Do Not Call requirements, and state contact restrictions apply to calls, texts, and emails.

Before any offer goes out

- [ ] Use evidence appropriate to any health claim you make, and never promise guaranteed outcomes.
- [ ] Make sure any offer is genuine and clearly explained, with its key conditions.
- [ ] Have discounts, gifts, referral incentives, and offers reviewed for applicable healthcare, payer, and state restrictions. See the HHS-OIG FAQs.
- [ ] Prescription-drug and device promotion needs separate review. Check applicable FDA requirements, state professional rules, and platform policies before publishing.
- [ ] Don't use time pressure that is not real.

5 Honor opt-outs promptly

- Honor clear marketing stop requests promptly, whichever channel they come through.
- Update suppression records so people who opted out are never re-added by mistake, and test that queued campaign messages stop.
- Make sure your team knows how to record an opt-out received by phone or at the front desk.
- For background on revoking consent, see the FCC's 2024 order on consent revocation.

6 Plan the campaign

- Choose one segment and one clear goal, for example consultations for a single treatment or service.
- Send the first approved message through the agreed channel.
- If permission continues, follow up once or twice with helpful, approved messages, leaving a sensible gap.
- Have your team ready to reply quickly and schedule appointments as responses arrive.
- Stop campaign follow-ups when someone schedules, declines, or opts out.

7 Measure appointments, not just clicks

- Messages sent, by segment.
- Replies and opt-outs.
- Consultations scheduled and attended.
- Treatments started, where you can link them back to the campaign.
- Any complaints, which should prompt an immediate review.

Your one-page action checklist

Check off every box before the first message goes out, then keep the list for your next campaign.

- [ ] Permission confirmed for each contact, channel, and purpose, with records kept.
- [ ] Do Not Call screening done for any marketing calls, unless a reviewed exception applies.
- [ ] Contacts who opted out, complained about contact, or appear on suppression lists excluded from the campaign.
- [ ] Duplicates and out-of-date details cleaned out.
- [ ] List segmented by treatment or service inquired about, or time since last visit.
- [ ] HIPAA authorization obtained where required, separately from text or email permission.
- [ ] Messages approved by the practice, with no sensitive health details and a working opt-out.
- [ ] Commercial emails include accurate sender details, a physical mailing address, and a working unsubscribe.
- [ ] Messages scheduled within permitted hours at each recipient's location.
- [ ] Offers genuine and accurate, with no guaranteed outcomes, and any incentives reviewed.
- [ ] Team briefed and ready to respond and schedule appointments.
- [ ] Suppression records updated as opt-outs arrive, with queued messages tested to stop.
- [ ] Results measured in scheduled and attended appointments, not just clicks.

Tip: print this page, check each box as it is done, and review it with your team every month.

THE SEEN TO SEATED METHOD

Want help putting this in place?

Book a free 30-minute clinic clarity session. We'll talk through where your practice is now, where you want it to be, and the steps worth taking next. You'll leave with three practical next steps, whether we work together or not.

Attract

Marketing that brings the right new patients to your practice.

Respond

24/7 inquiry handling, including an AI receptionist to handle routine inquiries and pass clinical questions to your team.

Convert

Follow-up and scheduling systems that turn interest into appointments.

Book a free 30-minute clinic clarity session

Schedule your free session: calendly.com/katie-honeychurch/demo

Email us: hello@seentoseated.com

The Seen to Seated Method

Helping U.S. healthcare practices turn inquiries into scheduled, attended appointments.

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