42 AGENCY PLAYBOOK

# Closed Lost Revival Playbook

Turn Dead Deals Into Pipeline Gold

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## Why Closed-Lost Deals Are Hidden Gold

Your CRM is sitting on untapped revenue. Closed-lost deals aren't dead—they're dormant. The prospect already knows you, went through evaluation, and had budget discussions. Something just didn't align *at that moment*.

**The math:** If you have 100 closed-lost deals from the past 18 months and can revive just 10% at your average deal size, that's pure pipeline you didn't have to generate from scratch.

> **42 Agency Benchmark:**
> Companies running structured closed-lost revival programs see 8-15% conversion rates on re-engaged opportunities—higher than most cold outbound.

## The Timing Triggers Framework

Not all closed-lost deals should be contacted at the same time. Match your outreach timing to the *reason* the deal was lost:

| Lost Reason | Wait Period | Why This Works |
| --- | --- | --- |
| **Budget/Timing** | 60-90 days | New quarter = new budget. Align with fiscal cycles. |
| **Chose Competitor** | 120-180 days | Honeymoon period ends. Implementation issues surface. |
| **No Decision/Stalled** | 90 days | Internal priorities may have shifted. New stakeholders may exist. |
| **Champion Left** | 30-60 days | Track champion to new company. Also re-engage account with new contacts. |
| **Wrong Timing** | Based on trigger | Set specific calendar reminder for when timing improves. |

# Re-Engagement Sequences by Lost Reason

### Sequence 1: Budget/Timing (4 touches over 3 weeks)

**Touch 1 (Email):** "Quick check-in—new quarter planning"

> *"Hi [Name], we connected back in [Month] about [solution]. I know timing wasn't right then. As you're planning for Q[X], wanted to see if [pain point] is still on your radar. Happy to share what's changed on our end."*

**Touch 2 (LinkedIn):** Connect or engage with their content

**Touch 3 (Email):** Share relevant case study or benchmark

**Touch 4 (Email):** Direct ask for 15-min call

### Sequence 2: Chose Competitor (3 touches over 4 weeks)

**Touch 1 (Email):** "Checking in on [Competitor] implementation"

> *"Hi [Name], hope the [Competitor] rollout is going well. We've been hearing from a few companies who started with them and are now evaluating alternatives. Not assuming that's you—just wanted to stay on your radar if priorities shift."*

**Touch 2:** Share competitive intel or industry benchmark

**Touch 3:** Offer comparison consultation

# Champion Tracking System

When your champion leaves, you have **two** opportunities:

1. **Follow the champion** to their new company (warm intro to a new account)
2. **Re-engage the account** with new stakeholders who may have different priorities

### Champion Tracking Workflow

1. Set up LinkedIn Sales Navigator alerts for all champions
2. When job change detected, wait 30-60 days (let them settle)
3. Reach out: "Congrats on the new role. When you're ready to tackle [pain point] at [New Company], I'd love to reconnect."
4. Simultaneously: Identify new stakeholders at the old account via LinkedIn/ZoomInfo
5. Reach out to new contacts: "We were working with [Champion Name] on [project]. Wanted to introduce myself as your point of contact."

> **Pro Tip:**
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> Champions who left often become your best referral sources. Even if their new company isn't a fit, ask: "Who else in your network is dealing with [pain point]?"

# Implementation Checklist

- [ ] Export all closed-lost deals from past 18 months
- [ ] Categorize by lost reason (budget, competitor, timing, champion left, no decision)
- [ ] Apply timing triggers to create contact date for each
- [ ] Build sequences in your sales engagement tool
- [ ] Set up champion tracking alerts in LinkedIn Sales Navigator
- [ ] Create "Closed-Lost Revival" pipeline stage to track re-engaged opps
- [ ] Review and refresh list quarterly

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