

CPR Framework Checklist

Prepared for **Reviving a Dormant Advocacy Program
in 90 Days**

Aug 8, 2025

What's Inside

CPR = Context First → Prioritize for Impact → Rebuild with Purpose

This checklist isn't about doing *everything*. It's about doing the *right things* first—so your advocacy program comes back smarter, sharper, and more sustainable. **CPR** stands for **Connect, Personalize, Reactivate**. This framework is particularly useful when customer engagement feels flat or dormant.

1. **Connect:**

Re-establish authentic connections. Use data signals, milestone moments, and account context to reignite conversations. Focus on quality over quantity—reaching the right champions and power users.

2. **Personalize:**

Move away from one-size-fits-all campaigns. Personalization here means delivering value tailored to their product usage, industry role, and strategic goals. This could be in the form of custom content, exclusive insights, or curated reference opportunities.

3. **Reactivate:**

Drive action. Whether it's joining an advocacy program, participating in a case study, or contributing feedback, reactivation is about helping the customer feel seen, heard, and empowered to re-engage.

The CPR Framework helps customer marketers breathe new life into accounts that are at risk of stagnation or churn, while uncovering unexpected advocates.

[Scroll down to walk through our journey](#)

DAYS 1 – 30 : CONTEXT FIRST

Objective: Understand what exists, what's working, what's broken, and why it stalled. No launching—just listening, auditing, observing.

□ Stakeholder Discovery

- Meet with Marketing, Sales, CS, and Support leaders
- Ask: What's your current perception of the advocacy program?
- Ask: What's working? What's not? What do you wish we did?

□ Program Audit

- Review existing platforms (portal, referral tools, CRM, CMS)
- Analyze historical engagement metrics:
 - Number of active advocates
 - Last engagement date per advocate
 - Response rate on reference requests
- Review all running “acts of advocacy” (e.g., reviews, referrals, stories, customer events)
- Identify orphaned or ownerless campaigns

□ Customer Voice Check

- Interview 5–7 past advocates (choose a mix of active and silent)
- Ask:
 - Why did you participate?
 - What discouraged you from continuing?
 - What would you love to do more of?
- Identify what recognition actually matters to them

□ Internal Positioning Snapshot

- Identify how advocacy is being pitched internally (if at all)
- Check if Sales/CS has enablement material using advocacy
- Note advocacy mentions in All Hands, Town Halls, QBRs

Progress Marker (End of Day 30):

You should have a **Program Map**:

- What exists
- What's active
- What's dead
- What stakeholders expect
- What customers value

DAYS 31 – 60 : PRIORITIZE FOR IMPACT

Objective: Make strategic decisions on what to pause, pivot, or push forward. Build internal momentum and protect your bandwidth.

☐ **Red Light: Pause or Sunset**

- Identify low-performing campaigns with no ROI or ownership
- Temporarily pause:
 - Reference intake if fulfilment is <50%
 - Ambassador programs with <20% activity
 - Low-quality review asks in automated emails
- Communicate pause internally with reasons + next steps

☐ **Yellow Light: Evaluate & Reframe**

- Review and relaunch:
 - Ambassador or champion groups with dormant activity
 - Unused customer stories or case studies (consider refreshing)
 - Review asks at the wrong lifecycle stage
- Create a new purpose/narrative for these activities

☐ **Green Light: Push Forward**

- Identify advocacy activities showing sustained ROI:
 - High-engagement advocates
 - Content being used in sales/marketing
 - Advocates still responding organically
- Reinforce these by updating copy, visuals, or cadence

☐ **Build Internal Buy-In**

- Share audit summary with key stakeholders
- Pitch a “Revival Sprint” with 1–2 experiments
- Ask Sales/CS to nominate advocates for a beta pilot

Progress Marker (End of Day 60):

You should have a **Prioritized Plan**:

- What's staying
- What's paused
- What's being repurposed
- Where your short-term wins will come from

DAYS 61 – 90: REBUILD WITH PURPOSE

Objective: Relaunch quietly, test advocacy moments, gather early proof, and reposition internally with renewed energy.

□ Pilot New-Look Advocacy

- Choose 1–2 test tracks:
 - A revamped reference process
 - A customer quote of the month
 - A curated mini-advocacy spotlight campaign
- Use personal invites—not mass emails
- Keep activities low-lift for customers

□ Relaunch Internally

- Share your CPR journey + quick wins in internal comms:
 - “Advocacy Reboot: Here’s what we’ve paused, fixed, and rebuilt”
- Launch internal Slack/email “Advocate of the Week” celebration
- Present revamped materials to Sales/CS Enablement teams

□ Track Early Wins

- Monitor:
 - Response rates
 - Time to reference fulfillment
 - Number of engaged advocates vs previous quarter
 - Sales/CS feedback on updated materials

□ Rebuild Program Identity

- Reintroduce the program with a new name/branding if needed
- Refine advocate onboarding and ask flow
- Create a new internal narrative:
“This is no longer a task—it’s a strategic trust engine.”

Progress Marker (End of Day 90):

You should have a **Beta Version of the Rebuilt Program** with:

- Advocates re-engaging
- Stakeholders bought in
- Measurable signals of traction
- A clear roadmap for scale

