

Customer re-engagement strategy planner

A structured planning worksheet for customer marketing leaders

Use this planner to build a multidimensional reengagement strategy for customers who have disengaged, churned, or are at risk of leaving. Work through each section in order – from diagnosing the root causes of disengagement to designing personalized touchpoints, community-led retention plays, and a positive churn offboarding experience.

This worksheet is designed for a **quarterly planning session** or an **annual strategy review**.

Section 1: Set your context

Fill in the basics before you begin planning. This grounds the strategy in a specific segment and time period.

Company/product name	Segment(s) in scope
<i>e.g., Wiley – Learning Tech Platform</i>	<i>e.g., Mid-market HR tech buyers, EMEA</i>
Planning period	Owner(s)
<i>e.g., Q3–Q4 2025</i>	<i>e.g., Head of Customer Marketing and CS Lead</i>

Section 2: Diagnose why customers disengaged

Before designing your reengagement approach, identify the root cause for each customer segment. Different causes require different tactics.

Disengagement reason	Example signal	How common? (H/M/L)	Primary action
Key contact left or changed role	<i>e.g., New VP of HR came in with a preferred vendor</i>	High ▾	<i>e.g., Identify new stakeholder, map to advocate persona, invite to roundtable</i>
M&A/tech consolidation	<i>e.g., Acquired company had an incumbent platform</i>	Low ▾	<i>e.g., Keep relationship warm via industry think tank; stay on radar for RFP</i>
Dissatisfied with product/onboarding	<i>e.g., Low adoption, no executive sponsor, missed onboarding milestones</i>	Medium ▾	<i>e.g., CS-led QBR and customer marketing support with tailored content</i>
Budget cuts / economic pressure	<i>e.g., Software consolidation directive from their CFO</i>	Low ▾	<i>e.g., Build ROI case; connect to peer advocates who can share value evidence</i>

Disengagement reason	Example signal	How common? (H/M/L)	Primary action
No perceived community or brand connection	<i>e.g., Purely transactional relationship; never engaged beyond renewal</i>	Medium ▾	<i>e.g., Invite to community event, webinar, or peer roundtable</i>
Other (add your own)		High ▾	

Section 3: Map your buyer and advocate personas

Reengagement requires different tactics for different people. Map both your economic buyers (who control the contract) and your functional buyers/product champions (the day-to-day users).

Persona type	Typical title(s)	What they care about	Advocate style	How to re-engage them
Economic buyer	<i>e.g., VP HR, CHRO, CFO</i>	<i>e.g., ROI, risk reduction, board-level metrics</i>	<i>e.g., Thought leader – wants to speak at events, contribute to research</i>	<i>e.g., Exclusive roundtable invite, analyst briefing, exec-to-exec outreach</i>
Functional buyer/ Champion	<i>e.g., HR Manager, L&D Lead, People Ops</i>	<i>e.g., Ease of use, peer community, career development</i>	<i>e.g., Knowledge provider – loves sharing tips with peers</i>	<i>e.g., Community forum, webinar speaker slot, certification program</i>
New contact (replacement hire)	<i>e.g., Newly hired into the buyer's role</i>	<i>e.g., Proving value quickly, building credibility with their team</i>	<i>e.g., Community builder – drawn to in-person networking</i>	<i>e.g., Warm intro via CS, early invite to in-person event or peer meetup</i>

Section 4: Reengagement touchpoint planner

Design your touchpoints by persona and channel. A strong reengagement strategy is multidimensional – it combines digital personalization, community moments, and human interaction.

Persona	Channel/format	Message theme	Personalization hook	Owner	Timing
Economic buyer	<i>e.g., Exec roundtable (in person)</i>	<i>e.g., Industry trends in HR tech consolidation</i>	<i>e.g., Reference their industry/geo challenge; personalize invite from your CMO</i>	<i>e.g., Head of CM</i>	<i>e.g., Q1, 6 weeks out</i>
Champion/functional buyer	<i>e.g., Webinar speaker slot or community post</i>	<i>e.g., Share your expertise on [topic] with your peers</i>	<i>e.g., Reference their specific use case or a past contribution</i>	<i>e.g., CM + CS</i>	<i>e.g., Ongoing/monthly</i>
New contact	<i>e.g., Warm CS intro + community onboarding email</i>	<i>e.g., Welcome – here's what your peers are talking about</i>	<i>e.g., Reference their role, team size, or stated goal</i>	<i>e.g., CS Lead</i>	<i>e.g., Within 2 weeks of role change</i>
Churned (recent)	<i>e.g., Think tank/industry event invite</i>	<i>e.g., You're still an expert in this space – stay connected</i>	<i>e.g., Topic aligned to their area of expertise, not your product</i>	<i>e.g., Head of CM</i>	<i>e.g., 30–60 days post churn</i>

Persona	Channel/format	Message theme	Personalization hook	Owner	Timing
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Add your own...

Section 5: Community and events play

Events and community are your highest-trust reengagement channel. They work for active customers, at-risk accounts, and churned buyers alike.

Initiative	Format	Topic/theme	Target audience	Goal	Success metric
Industry think tank	<i>e.g., Quarterly in-person roundtable (6–12 seats)</i>	<i>e.g., Employee engagement trends in mid-market HR</i>	<i>e.g., Strategic accounts, plus 2–3 churned/at-risk buyers</i>	<i>e.g., Re-establish brand relevance; generate warm leads for CS</i>	<i>e.g., 2 churned accounts re-enter the pipeline within 6 months</i>
Peer webinar series	<i>e.g., Monthly virtual, customer-led session</i>	<i>e.g., How [customer] built their onboarding playbook</i>	<i>e.g., Champions and new contacts across accounts</i>	<i>e.g., Deepen product stickiness; surface new champions</i>	<i>e.g., Attendance rate, repeat engagement, NPS delta</i>
Community forum/Slack groups	<i>e.g., Always-on digital community (owned channel)</i>	<i>e.g., Industry topics, peer Q&A, product tips</i>	<i>e.g., All customer tiers and alumni/churned buyers</i>	<i>e.g., Own the conversation in your space; keep alumni engaged</i>	<i>e.g., Monthly active members, referral conversations tracked</i>
Add your own...					

Section 6: Churn offboarding – leave a lasting impression

How you treat a customer when they leave determines whether they come back, or refer you. Design a deliberate offboarding moment for each churn scenario. Be kind. Make them miss you.

Churn scenario	Recommended action	Suggested asset / Gift	Timing	Who sends it?	Re-entry signal to watch
Decision not to renew (buyer's choice)	<i>e.g., Personal note from CM or CS lead + farewell kit via Sendoso</i>	<i>e.g., Branded item + handwritten card referencing their specific contribution (CAB, case study, event)</i>	<i>e.g., Within 5 days of the final day</i>	<i>e.g., CM + CS</i>	<i>e.g., Contact moves to new company; company re-enters RFP process</i>
M&A / forced platform switch	<i>e.g., Email from senior leader acknowledging situation; keep on community invite list</i>	<i>e.g., Access to alumni community + industry think tank invite</i>	<i>e.g., Within 2 weeks of churn confirmation</i>	<i>e.g., Head of CM</i>	<i>e.g., Dissatisfaction with new platform; new RFP opened</i>
Budget cut / economic pressure	<i>e.g., Warm email: door is open, here's a resource to keep in touch</i>	<i>e.g., Curated content pack relevant to their role/industry</i>	<i>e.g., At the point of cancellation</i>	<i>e.g., CS Lead</i>	<i>e.g., Budget unfreezes; contact reaches out via LinkedIn</i>

Churn scenario	Recommended action	Suggested asset / Gift	Timing	Who sends it?	Re-entry signal to watch
Key contact left (account still active)	<i>e.g., Celebratory send-off for departing contact; CS intro to replacement</i>	<i>e.g., Personalized farewell note referencing their work together</i>	<i>e.g., Within 1 week of departure</i>	<i>e.g., CM + CS</i>	<i>e.g., Departing contact joins new company – track as warm lead</i>

Section 7: AI and personalization toolkit

AI can scale your reengagement efforts without losing the personal touch. Identify where AI can accelerate your work and where human judgment stays in the loop.

Task	Recommended AI approach	Keep human for	Tools to consider
Personalise outreach by industry/geo/persona	<i>e.g., Use AI to generate 10–50 industry-specific message variants from a single brief</i>	<i>e.g., Final tone review; relationship-sensitive accounts</i>	<i>e.g., ChatGPT/Claude – prompt: “You are an expert in [industry]. Write a personalised reengagement email for a [persona] who...”</i>
Summarise customer interviews/transcripts	<i>e.g., Upload call transcript; extract key themes, concerns, advocacy signals</i>	<i>e.g., Interpreting emotional context; deciding what action to take</i>	<i>e.g., Claude/ChatGPT – remove company names before uploading per your data policy</i>
Build a strategy with AI as a co-interviewer	<i>e.g., Prompt: “Ask me questions to help me build a reengagement strategy for [segment]” – let it interview you</i>	<i>e.g., Final decisions, stakeholder alignment, budget asks</i>	<i>e.g., ChatGPT/Claude – an interactive strategy built over multiple prompts</i>
Create branded visual assets	<i>e.g., Generate on-brand imagery using company colours and themes instead of stock photos</i>	<i>e.g., Brand review; ensuring alignment with design guidelines</i>	<i>e.g., Midjourney, Adobe Firefly, Bing Image Creator, Catbird</i>

Task	Recommended AI approach	Keep human for	Tools to consider
Build presentations and content rapidly	<i>e.g., Draft a business case or strategy deck outline in minutes</i>	<i>e.g., Stakeholder presentation delivery; exec buy-in conversations</i>	<i>e.g., Gamma (slide decks), Opus (video with subtitles), Canva AI</i>

Section 8: Strategy summary and business case

Consolidate your plan into a one-page summary to share with your leadership team, sales, or cross-functional stakeholders. A reengagement strategy is only as strong as its ability to earn investment and cross-team support.

Goal & vision (1–2 sentences)	What does success look like at the end of this period?
<i>e.g., Re-engage 15 at-risk accounts and recover 3 churned accounts within 12 months by deploying a personalized, community-led reengagement strategy.</i>	<i>e.g., Renewal rate stabilised above 88%; 2 churned accounts back in active pipeline; community NPS up 10 points.</i>
Key customer segments targeted	Resources required
<i>e.g., Mid-market HR tech, EMEA; economic buyers at VP+ level; champions at manager level</i>	<i>e.g., 0.5 FTE CM; Sendoso budget \$5k; event budget \$10k; AI tools \$0–\$75/month</i>
Technology & platforms	Cross-functional dependencies
<i>e.g., Salesforce (account tracking), Sendoso (gifting), HubSpot (email automation), Slack (community)</i>	<i>e.g., CS (account intel and intros), Sales (nominations), Product Marketing (content), Events (think tank logistics)</i>

Section 9: 90-day action plan

Break your strategy into a clear 90-day execution plan. Assign owners and set deadlines so this stays a living document, not a shelf asset.

Action	Owner	Deadline	Status
<i>e.g., Audit Salesforce to identify at-risk and churned accounts from the past 12 months</i>	<i>e.g., CS Lead</i>	<i>e.g., Week 2</i>	On track ▾
<i>e.g., Map top 20 accounts to persona types (economic buyer vs. champion)</i>	<i>e.g., Head of CM</i>	<i>e.g., Week 3</i>	On track ▾
<i>e.g., Define think tank/community event format and secure topic list</i>	<i>e.g., CM + Events</i>	<i>e.g., Week 4</i>	Behind ▾
<i>e.g., Set up Sendoso farewell kit workflow; brief CS on trigger criteria</i>	<i>e.g., CM</i>	<i>e.g., Week 5</i>	Behind ▾
<i>e.g., Launch personalised reengagement email sequence for the top 10 at-risk accounts</i>	<i>e.g., CM</i>	<i>e.g., Week 6</i>	Behind ▾
<i>e.g., Host first think tank/roundtable event</i>	<i>e.g., CM + Events</i>	<i>e.g., Week 8-10</i>	At risk ▾
<i>e.g., Review results; report back to leadership with pipeline impact</i>	<i>e.g., Head of CM</i>	<i>e.g., Day 90</i>	At risk ▾
Add your own action...			

Action	Owner	Deadline	Status
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Add your own action...
