Plan On a Page: Enterprise Customer Expansion Campaign

Executive Sponsor: Michelle Roberts, Chief Customer Officer

Project Lead: James Park, Director of Customer Marketing

Project Manager: Nicole Anderson

Vendor / Agency Details: Gainsight (customer platform), UserTesting (research), Printfection (swag)

Internal Creative Team(s): Customer Marketing team, Customer Success content creators

D/I/N:

- **Decide:** Michelle Roberts, James Park, VP Customer Success
- **Input:** Account Management, Product Management, Sales, Regional CS Leaders
- **Notify:** Finance (upsell tracking), Marketing Operations, Executive Team

G/R/L

Geography	Lead Name	Notes (Adopt/Adapt/Invent)
Global:	James Park	**Creates** customer expansion playbook, success metrics framework, upsell campaign templates, and customer advocacy program. Global develops core expansion methodology (product adoption scoring, health scoring, expansion triggers), creates educational webinar series for customers, and builds referral program infrastructure. Produces customer success stories and ROI calculators.
Regional:	Tom Bradley (Americas), Elena Volkov (EMEA), Yuki Sato (APAC)	**Adapt** - Regional teams adapt playbook for local customer segments. Americas focuses on land-and-expand with SMB→Enterprise growth. EMEA emphasizes multi-year commitment and compliance-driven expansion. APAC creates relationship-driven approach with in-person QBRs. Each region adapts ROI messaging for local business cases and adds regional customer advisory board. Regional teams adjust success metrics for market maturity.
Local:	Country CSMs	**Adopt** - Local customer success managers adopt regional playbooks and execute customer touchpoints. Use regional content and templates as-is. Local teams facilitate regional customer events and community building. Escalate expansion opportunities to regional team.

Marketing objectives: Support FY24 Net Revenue Retention OKR: Achieve 125% NRR across enterprise segment (>$100K ACV). Drive $85M in expansion revenue from existing customers. Reduce churn from 8% to 5% through proactive engagement.

Project description: Systematic customer expansion campaign targeting existing enterprise customers ($100K+ ACV) with high product adoption and health scores. Multi-touch program combining executive business reviews, product education, use case expansion, and advocacy cultivation. Focus on driving upsell, cross-sell, and multi-year renewals.

Audience: Primary: Economic buyers and champions at existing enterprise customers showing expansion signals (high NPS, product adoption >60%, growing usage). Titles: VP/Director level in IT, Engineering, Product. They care about: maximizing ROI, expanding use cases, executive sponsorship, innovation roadmap. Secondary: End users and administrators who can champion expansion internally.

Key messages:

1. You've achieved [X]% efficiency gains - imagine doubling that with advanced features
2. Companies like yours are expanding from [use case A] to [use cases B, C, D]
3. Lock in current pricing and add $500K in value with our Enterprise Plus plan
4. Join our Customer Advisory Board and shape the future of our platform

Investment: $420K (customer events: $180K, content production: $100K, advocacy program: $80K, gifts/incentives: $60K) + 8 FTEs across CS and Marketing

Milestones | Key activities:

- January 15: Expansion playbook v2.0 finalized
- February 1: Customer segmentation and health scoring refresh
- February 20: Top 200 expansion targets identified (predictive model)
- March 1: Executive Sponsor Program launch (50 target accounts)
- March 15: Product education webinar series begins (monthly)
- April 10: Q1 Executive Business Reviews (EBRs) complete - 50 accounts
- May 1: Customer Advisory Board recruitment (15 members)
- June 5-6: Customer Summit (in-person, 200 attendees)
- July 15: Use case expansion campaign (AI features upsell)
- August 20: Referral program 2.0 launch (incentivized)
- September 30: Multi-year renewal campaign for FY25 renewals
- October 15: Customer Innovation Awards (showcase success stories)
- November 20: Year-end expansion push (budget flush opportunities)
- December 31: FY24 NRR results and FY25 planning

Risks / Blockers:

- Economic downturn impacting customer budgets (mitigation: emphasize cost savings, efficiency gains, flexible payment terms)
- Product gaps limiting expansion (mitigation: close collaboration with product on roadmap)
- Executive sponsor turnover at key accounts (mitigation: multi-threading, relationship mapping)
- CSM capacity constraints (mitigation: automation of low-touch activities, hire 3 additional CSMs)
- Competitive displacement in renewal base (mitigation: proactive competitive monitoring, executive engagement)

Activation Components:

- **Executive Business Reviews:** Quarterly EBRs with Top 200 accounts (custom ROI analysis, roadmap preview)
- **Product Education:** Monthly webinar series on advanced features and new use cases
- **Executive Sponsor Program:** Match customer execs with our execs (50 pairings)
- **Customer Advisory Board:** Quarterly meetings, exclusive roadmap input, networking
- **Customer Summit:** Annual in-person event with keynotes, sessions, networking (200 attendees)
- **Use Case Expansion Campaigns:** Targeted campaigns for specific product upsells (email, in-app)
- **Success Stories:** Video case studies, written stories, joint webinars (30 total)
- **Referral Program:** $5K referral bonus for customer referrals that close
- **In-App Engagement:** Feature discovery campaigns, adoption triggers, upgrade prompts
- **Customer Community:** Online forum, Slack channel, monthly meetups (virtual + in-person)
- **VIP Experiences:** Innovation labs, executive dinners, industry event sponsorships
- **Recognition Program:** Customer Innovation Awards, success badges, social recognition

KPIs, Anticipated Impact & Measurement:

- **Net Revenue Retention:** 125% NRR across enterprise segment (target: $100M → $125M)
- **Expansion Revenue:** $85M in upsell/cross-sell from existing customers
- **Churn Reduction:** Gross churn reduced from 8% to 5% (annual contract value basis)
- **Product Adoption:** 75% of enterprise customers using 3+ product modules (up from 45%)
- **Executive Engagement:** 80% of Top 200 accounts have active executive sponsor relationships
- **Multi-Year Renewals:** 40% of renewals are multi-year commitments (up from 22%)
- **Customer Advocacy:** 100 new reference customers, 30 case studies published
- **Referral Revenue:** $8M in revenue from customer referrals
- **NPS Improvement:** Enterprise NPS increases from 52 to 60
- **Customer Lifetime Value:** 35% increase in average CLV for expansion cohort
- **Time to Expansion:** Reduce time from initial purchase to first expansion from 18 to 12 months
- **Upsell Win Rate:** 65% win rate on identified expansion opportunities