Expansion Sales Playbook: Upsell and Cross-sell

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1. Objective

To systematically grow Annual Recurring Revenue (ARR) within the installed customer base by maximizing adoption and identifying new value opportunities.

2. Key Expansion Triggers

AEs must monitor the following signals (in partnership with the CS Manager):

Trigger Event	Signal in the CRM/CS Platform	Recommended Action
High Utilization	Client approaching 80% of their licensed API calls or data throughput limit.	Propose a **Tier Upgrade** (e.g., Professional to Enterprise) to lock in a new rate before overages hit.
Annual Renewal (D-90)	Opportunity flagged for renewal in the next 90 days.	Initiate the **Value Review**, showing YTD ROI metrics and proposing a multi-year renewal with an added module.
Internal Referral	Successful project completion leads to an introduction to a new department (e.g., Finance introduces AE to HR).	Initiate a new **Automation Audit** specific to the new department's workflows (Cross-sell).
Compliance Change	Client is facing a new regulatory mandate (e.g., new AML law).	Propose the **Compliance & Audit Log Module** add-on as a rapid solution (Upsell).

3. Upsell Strategy: Tier Upgrades

Focus on moving clients to the next tier by emphasizing **risk mitigation** and **predictable budgeting**. A higher tier removes usage limits, provides a better SLA, and includes advanced governance features necessary for mission-critical adoption.

4. Cross-sell Strategy: Adjacent Workflows

Map the client's organizational chart to identify **adjacent workflows** that suffer from similar manual data problems.

Existing Workflow	Target Cross-sell Workflow	Selling Point
Fraud Detection (Risk)	Predictive Credit Scoring (Finance)	Leverage the existing security infrastructure and deployment model for rapid time-to-value.
Logistics Forecasting (Ops)	Production Line Optimization (Manufacturing)	Apply the same anomaly detection algorithms to machine sensor data.

5. Sales Approach

The expansion sale should be positioned as a **strategic business review**, not a pitch. Lead with the success metrics achieved in the initial deployment and ask, "Where else can we replicate this quantifiable success?"