

How to Spot Expansion Opportunities in Plain Sight

Episode 15 Companion Download

This worksheet accompanies Episode 15 of ClearPath Conversations. Use it to implement the four-step expansion revenue system that consistently generates predictable expansion opportunities. Start This Friday. Spend 15 minutes implementing Step 1. Add one step per week.

Step 1: Weekly Signal Detection Framework

Every Friday, spend 15 minutes reviewing each customer account against these three signal categories:

Usage Pattern Signals

These tell you about organic growth and capacity constraints:

- Monthly active users increasing by 20% or more
- Feature utilization approaching current plan limits
- New user roles accessing the platform
- Support tickets from previously unseen users
- API calls increasing significantly month-over-month

Organizational Change Signals

These tell you about structural shifts that create expansion drivers:

- New executive hires in roles related to your solution
- Company expansion announcements (new locations, markets, product lines)
- Merger, acquisition, or partnership announcements
- Compliance requirement changes affecting their industry
- Team restructuring creating new use cases

Business Context Signals

These tell you about readiness and appetite for investment:

- Funding announcements or financial growth indicators
- Strategic initiatives mentioned in earnings calls or press releases
- Success stories they share indicating growing confidence
- Questions about roadmap features or strategic direction
- Discussions about longer-term partnerships

⚠ Document signals immediately when identified. Signals lose context quickly.

Step 2: IMPACT Qualification Scorecard

Score each signal against these six criteria. Opportunities scoring strong in 4-5 categories represent immediate expansion potential. Those scoring 2-3 need development. Single-category opportunities should be monitored.

I - Immediate Need Indicators

Is there a current pain point or business requirement that expansion addresses RIGHT NOW? Compliance gaps, scaling challenges, manual processes causing errors = immediate needs. 'Nice to have' features = wish list items. Big difference.

Strong Moderate Weak

M - Money / Budget Accessibility

Does budget exist or could it be allocated? Look for: Strategic initiatives leadership prioritizes, mentions during planning cycles, finance people in conversations. You're looking for evidence money could be secured if the business case is strong enough.

Strong Moderate Weak

P - Person / Decision Maker Access

Do you have relationships with people who INFLUENCE expansion decisions? Stakeholders who can champion internally, explain the process, connect you with decision makers. Day-to-day users only = weak. Directors who walk proposals up the chain = strong.

Strong Moderate Weak

A - Authority / Approval Process Understanding

How do expansion decisions get made in their organization? Manager signature? Or procurement + legal + security + three executive layers? Map the process BEFORE you need it, not during a time-sensitive opportunity.

Strong Moderate Weak

C - Compelling Event Timeline

Is there a specific deadline creating urgency? Compliance deadlines, fiscal year-end budget cycles, executive mandates, product launches, mergers, contract renewals. Without compelling events, expansion conversations drift indefinitely.

Strong Moderate Weak

T - Technical Feasibility Confirmation

Can your platform actually solve their need? Confirm capability exists and can be delivered in timeline matching customer need. Talk to solutions engineers. Check roadmap. Don't build opportunity around something that can't be delivered.

Yes (Strong) No (Weak)

Step 3: Expansion Conversation Framework

Position yourself as strategic partner, not sales rep. Notice: product discussion happens at the END.

Phase 1: Context Setting (5-10 minutes)

Reference the specific signals you've observed.

Example: 'I noticed you mentioned launching telehealth services and that HIPAA compliance would be critical...'

Phase 2: Situation Exploration (10-15 minutes)

Ask open-ended questions about the broader business context:

- What's driving this initiative?
- What timeline are you working against?
- Who's leading this internally?
- What compliance requirements are you most concerned about?

Phase 3: Impact Discovery (10-15 minutes)

Quantify business implications of solving OR NOT SOLVING the challenge:

- What's at stake if this doesn't get solved?
- What does success look like in measurable terms?
- How does this connect to your strategic objectives?

Phase 4: Solution Connection (10-15 minutes)

Connect their needs to potential solutions ONLY AFTER fully understanding context.

By this point, it feels like strategic problem-solving, not a sales pitch.

You've earned the right to make recommendations by demonstrating you understand their business context.

Phase 5: Next Steps Agreement (5 minutes)

Clear actions and timeline expectations:

- Who does what by when?
- What does the approval process look like?
- When do we reconnect?

🎯 Key Principle: You lead with their business challenges, not your capabilities.

Step 4: Business Case Toolkit

Help customers build internal justification. You're not selling TO them - you're helping them sell INTERNALLY.

ROI Calculation Categories

Cost Savings:

- Reduced process time (hours saved × hourly cost)
- Eliminated manual work (FTE capacity freed)
- Avoided vendor costs (tools/licenses no longer needed)

Revenue Impact:

- Time to market improvements (revenue accelerated)
- Productivity gains (output increase × value per unit)
- Competitive advantages (market share protected/gained)

Risk Mitigation:

- Security breach prevention (average breach cost avoided)
- Compliance penalty avoidance (fine amounts × probability)
- System downtime reduction (uptime hours × revenue per hour)

Business Case Components to Build

Your toolkit should include templates for:

- 1. Executive Summary** - 1-page overview of the opportunity, investment, and expected return
- 2. Current State Analysis** - Document existing challenges, costs, and limitations
- 3. Financial Analysis** - ROI calculations, payback period, 3-year value projection
- 4. Implementation Plan** - Timeline, resource requirements, risk mitigation

Remember: When you help customers build the business case using THEIR numbers and THEIR context, you transform from vendor to strategic partner. This strengthens relationships even when customers decide not to move forward immediately.

Expansion Timing Guidance

Even qualified opportunities with strong business cases can fail if approached at the wrong moment.

✓ Optimal Timing Signals

- Customer just achieved measurable success with your platform
- Major milestone completion (implementation, certification, executive recognition)
- Annual planning periods (Q4 for following year budget allocation)
- Contract renewal periods (already evaluating value and investment)
- Recent executive praise or recognition for outcomes your platform enabled

X Poor Timing Signals

- Customer dealing with major incident or crisis
- Struggling with current implementation
- Immediately after renewal (missed the natural window)
- Major organizational change/uncertainty (leadership transitions, re-orgs)
- Budget freeze or hiring freeze announced

Your 4-Week Implementation Plan

Start with Step 1 this Friday. Add each subsequent step weekly until all four are part of your operating rhythm.

Week 1: Implement Friday 15-minute signal detection review

- Block 15 minutes on your calendar every Friday.
- Review each account against the three signal categories.
- Document any signals immediately in your CRM.

Week 2: Apply IMPACT qualification to any signals detected

- Score each signal against all six IMPACT criteria.
- Focus energy on 4-5 strong category opportunities.
- Develop 2-3 category opportunities before pursuing.

Week 3: Practice 5-part conversation structure on next expansion discussion

- Use the framework: Context Setting → Situation Exploration → Impact Discovery → Solution Connection → Next Steps.
- Lead with discovery, not product.

Week 4: Build your first business case toolkit template

Create templates for executive summary, current state analysis, financial analysis, and implementation plan. These are reusable across opportunities.

Quick Reference: The 4-Step System

1. **Signal Detection**
Every Friday, 15 minutes reviewing usage patterns, organizational changes, business context
2. **IMPACT Qualification**
Immediate need, Money, Person, Authority, Compelling event, Technical feasibility
3. **Conversation Framework**
Context → Situation → Impact → Solution → Next Steps (product at the END)
4. **Business Case Toolkit**
Help customers sell internally with ROI calculations and templates

How You'll Know It's Working

- You're identifying opportunities 2-3 months before customers formally request proposals
- Expansion conversations feel consultative, not sales-driven
- Customers ask you to help build internal business cases
- Leadership can forecast your expansion pipeline quarter-over-quarter
- Win rates on qualified opportunities exceed 60%

Next Steps and Resources

This guide is part of the Expansion, Advocacy, and Growth mini-series on ClearPath Conversations:

- **Episode 15:** How to Spot Expansion Opportunities in Plain Sight
- **Episode 16:** The CSM's Guide to Customer Advocacy
- **Episode 17:** How to Introduce CS-Led Upsell Without Feeling Salesy

Additional Resources:

- *The CSM's Personal Playbook:* Systematic frameworks for expansion detection, qualification, and revenue growth
- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at [linkedin.com/in/markbernardin](https://www.linkedin.com/in/markbernardin)