How to Introduce CS-Led Upsell Without Feeling Salesy

Episode 17 Companion Download

This CS-Led Expansion Toolkit provides the systematic frameworks and templates discussed in Episode 17: How to Introduce CS-Led Upsell Without Feeling Salesy. Use these resources to identify expansion opportunities, conduct discovery conversations, and build compelling business cases that drive revenue growth while strengthening customer relationships.

The 5-Part Expansion Conversation Framework

This framework keeps you in your advisory role while opening doors for revenue growth. Follow each part in sequence for maximum effectiveness.

Part 1: Context Setting (5 minutes)

Reference the specific signals you've observed. You're not pitching—you're opening a door.

> Example Opening:
>
> *"I've been noticing some patterns in your usage data, and I wanted to ask you a few questions."*

Part 2: Situation Exploration (10-15 minutes)

Ask open-ended questions about the broader context. This is where you discover whether there's actually a problem worth solving.

Key Questions:

- What are you trying to accomplish?
- What's working well in your current setup?
- What challenges are you experiencing?
- What would success look like for you?

Part 3: Impact Discovery (10-15 minutes)

Quantify the business implications in terms of their business, not your product. Help them build their own internal business case.

Impact Questions:

- How much time is your team spending on these workarounds?
- What's the risk if this continues for another quarter?
- What would it mean for your operations if you could eliminate this friction?
- What's the cost of what you're missing while working around this limitation?

Part 4: Solution Connection (10-15 minutes)

After completing all consultative work, introduce the capability. Present it as one option worth exploring, not the only solution.

Example Positioning:

"Based on what you've shared, there are a few ways you could solve this. One approach is to keep doing what you're doing and accept the time cost. Another is to build something internally, which would take development resources. A third option is to leverage [our capability], which includes these features. I'm happy to walk you through what that looks like if you think it's worth exploring."

Part 5: Next Steps Agreement (5 minutes)

Get clear on what happens next. Establish the timeline, decision-making process, and who needs to be involved. Expansion opportunities die in ambiguity.

Example Close:

"If you want to explore this further, here's what I'd recommend. Let's schedule a deeper conversation for next week where I can walk through implementation details. I'll also pull together some examples from similar customers in your industry. Does that timeline work for you?"

Expansion Signal Detection Checklist

Review your accounts weekly against these signal categories. Multiple signals across categories often indicate significant expansion potential.

Signal Category	Indicators to Watch For
Usage Patterns	• Monthly active users increasing by 20%+ • Feature utilization approaching plan limits • New user roles accessing the platform • Repeated questions about specific capabilities (5+ times) • API calls increasing significantly month-over-month
Organizational Changes	• New executive hires in roles related to your solution • Company expansion (new locations, markets, product lines) • Merger, acquisition, or partnership announcements • Compliance requirement changes • Team restructuring creating new use cases
Business Context	• Funding announcements or financial growth indicators • Strategic initiatives mentioned in earnings calls • Customer success stories they share (growing confidence) • Questions about roadmap features or strategic direction • Discussions about longer-term partnerships

IMPACT Qualification Framework

Not every signal translates to immediate revenue opportunity. Use this framework to qualify expansion potential. Opportunities scoring strong in 4-5 categories represent immediate expansion potential. Those scoring 2-3 categories need further development.

	Criterion	Qualification Questions
I	Immediate Need	Does the customer have current pain points this expansion addresses? Is there urgency?
M	Money/Budget	Are there indicators that budget exists or could be allocated for this expansion?
P	Person/Decision Maker	Do you have relationships with expansion decision influencers and stakeholders?
A	Authority/Approval Process	Do you understand how expansion decisions get made at this account?
C	Compelling Event	Are there specific deadlines or events creating urgency around solving this problem?
T	Technical Feasibility	Does your platform have the capability to solve their identified need?

Business Case Development Template

Many expansion opportunities stall because customers need help building internal justification. Use this template to create ROI calculations that help customers sell the expansion internally.

Cost Savings Analysis

- Current process time investment: ______ hours per week/month
- Number of people involved: ______
- Loaded hourly cost: $______
- Annual labor cost: $______ (hours × people × cost × 52 weeks or 12 months)
- Error costs or rework: $______
- Vendor costs for workarounds: $______

Revenue Impact Analysis

- Time-to-market improvements: ______ days/weeks faster
- Estimated revenue impact: $______
- Productivity gains: ______ % improvement
- Competitive advantages gained: ________________

Risk Mitigation Analysis

- Security breach costs (if applicable): $______
- Compliance penalties avoided: $______
- System downtime impact: $______ per hour/day
- Incidents prevented or detected faster: ______

Total Value Summary

Annual Cost Savings	$__________
Annual Revenue Impact	$__________
Risk Mitigation Value	$__________
Total Annual Value	$__________
Annual Expansion Investment	$__________
Net Annual Benefit (ROI)	$__________

Weekly Expansion Audit Workflow

Dedicate 15 minutes every Friday to review your portfolio systematically. This proactive habit transforms you from reactive responder to strategic opportunity creator.

The 15-Minute Friday Review

1. Open your customer list and review each account individually (3 minutes per account for your top 5)
2. Check for usage pattern signals: Log into your analytics platform and look for the indicators from the checklist
3. Review recent conversations: Scan your last 2-3 interactions for repeated questions or pain points
4. Check LinkedIn/company news: Look for organizational changes or business context signals
5. Document any signals immediately: Create a tracking entry with the date and specific observation
6. When you spot 2-3 signals for the same account, apply the IMPACT qualification framework

Signal Tracking Table

Use this format to document signals as you discover them:

Account	Date	Signal Observed	Category	Next Action
ABC Corp	2/7/26	Asked about SIEM integration 3x in past month	Usage Pattern	Schedule discovery call

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