Upsell / Cross-Sell Opportunity Worksheet

Identifying expansion revenue in existing accounts instead of only chasing new logos.

For Each Account, Answer

1. What are they currently using, and how much of it?
2. Are they using it well enough to be a candidate for more?
3. What other problems do they have that you could help solve?

Signals Worth Watching

- ☐ Usage growing faster than their current plan supports
- ☐ They've mentioned a problem outside your current scope, in passing
- ☐ Their business has grown or changed since the original deal
- ☐ A renewal or business review is coming up

Simple Tracking

ACCOUNT	CURRENT SPEND	OPPORTUNITY	SIGNAL	NEXT ACTION

How To Approach The Conversation

Lead with their goals, not your product. The strongest upsell conversations start from "here's what you're trying to accomplish" rather than "here's what else we sell."

> Don't force an upsell onto an account that's not actually getting value from what they already have; fix the foundation first, or the expansion won't stick.