



TOPLINE STRATEGY

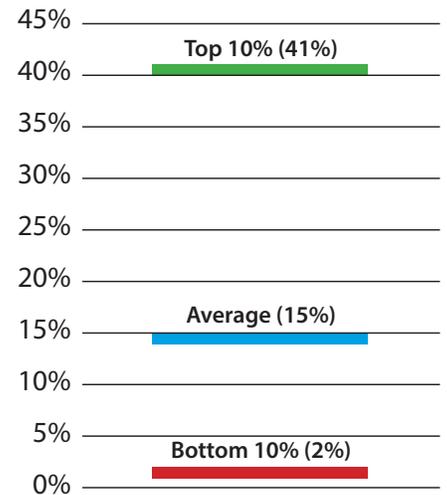
Market Strategy Consulting • Strategic Customer Experience • Investment Diligence

Topline’s Cross-sell & Upsell Accelerator for Gainsight Driving Growth and Profitability Through World Class Cross-selling and Upselling

The Topline Strategy Group is a boutique management consulting firm that specializes in market strategy, customer experience and investor diligence for business to business Technology companies and their investors. Our clients range from core IT infrastructure companies to technology-enabled business services.

Excellence in cross-selling and upselling is vital to growth. While the median SaaS vendor realizes 15% ARR growth from cross-selling and upselling, the Top 10% achieved nearly triple that level (41%) while the Bottom 10% got nearly none at all (2%).

Cross-selling and upselling is also highly profitable. It costs \$1.32 in sales and marketing to acquire \$1 of ARR from new customers. However, it only costs \$.38 for each \$1 in expansion sales and \$.72 for each \$1 of cross-selling.



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World Class Results by Aligning Cross-selling and Upselling Efforts with Customers

What separates the companies in the Top 10% from the rest? Leaders have systematic programs to identify, target and nurture customers for cross-sales and upsales.

The fact is that cross-selling and upselling is far more complicated than just educating your customers on what you offer and taking orders:

- **Need:** Not all of your customers need all of your products. According to Topline’s research, in most cases, only 20% to 60% are candidates for any specific additional product. The same is true for expansion. Typically, only 50% to 70% of customers are candidates to buy more of the products they already own.
- **Buying Journey:** Different customers have different upsell and cross-sell buying journeys. Furthermore, even within the same account, there may be different journeys for different products.
- **Timing:** Customers are ready to buy different products at different times.

Companies achieve world-class results when they thoroughly understand these fundamentals of cross-selling and upselling and set up systems and processes to capitalize on them. Companies that do not effectively align their processes with customers waste time chasing poor prospects and miss opportunities with good ones.



Topline's Cross-sell & Upsell Accelerator for Gainsight

Topline's Cross-sell & Upsell Accelerator program for Gainsight combines Topline's Strategic CX Advisory Services with Gainsight's market leading Customer Success platform to provide companies with an end-to-end solution for creating a world-class cross-selling and upselling capability. The program has options for customers who are new to Gainsight and those with existing Gainsight deployments.

The program is comprised of the following 3 steps:

1. Customer Cross-sell & Upsell Research

To develop a deep understanding of which customers are likely to buy which products, how they buy, and when they are going to buy, Topline conducts in-depth research that combines interviews with a broad cross-section of customers, a customer survey and analysis of customer sales history. This module's deliverables include:

- **Targeting and Qualification Criteria:** Detailed criteria for determining which customers are the best prospects for which offerings
- **Customer Messaging:** Messages targeted at different groups of customers for driving demand
- **Buyer Journey Maps:** Buyer Journey maps for each of the major segments of customers by each major offering that identify the steps of the purchase process

2. Cross-sell & Upsell Process & Gainsight Design

Through a series of workshops with key stakeholders, the research findings and deliverables are translated into processes and system requirements for identifying, targeting, nurturing and closing upsell and cross-sell opportunities.

This step includes designing the specific elements for Gainsight required to support and manage the process including:

- Customer data elements for classifying the cross-sell and upsell opportunities by customer
- Success plan templates
- Cross-sell and upsell playbooks
- Triggers and CTAs
- Reports and analytics

3. Gainsight Implementation & Process Rollout

The final step is to implement and rollout the new processes. This includes:

- **Gainsight configuration:** Configuring the customer data elements, playbooks, triggers, CTAs, reports, etc. into the Gainsight system. *For customers who are new to Gainsight, this would also include the initial stand up of the system*
- **Pilot:** A 4 to 8 week pilot with selected customers/CSMs to test and refine the process
- **Rollout:** Company-wide training and rollout