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# Accelerate Your B2B SaaS Growth: Mastering Customer Expansion

*You own expansion, now what?*

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Customer Expansion Marketing Pros



**ACCELERATE!**

## Rachel Ward

Director, Customer Lifecycle Marketing  
Absorb LMS

ATLien.

Boy mom.

Tequila enthusiast.

Brewer's daughter.

Coffee and Jesus lover.

Halloween fanatic (#spookyseason).



## **Alyse Chiariello**

Director, Customer Marketing  
Responsive

New Yorker.

Girl mom.

Sushi lover.

Teacher's daughter.

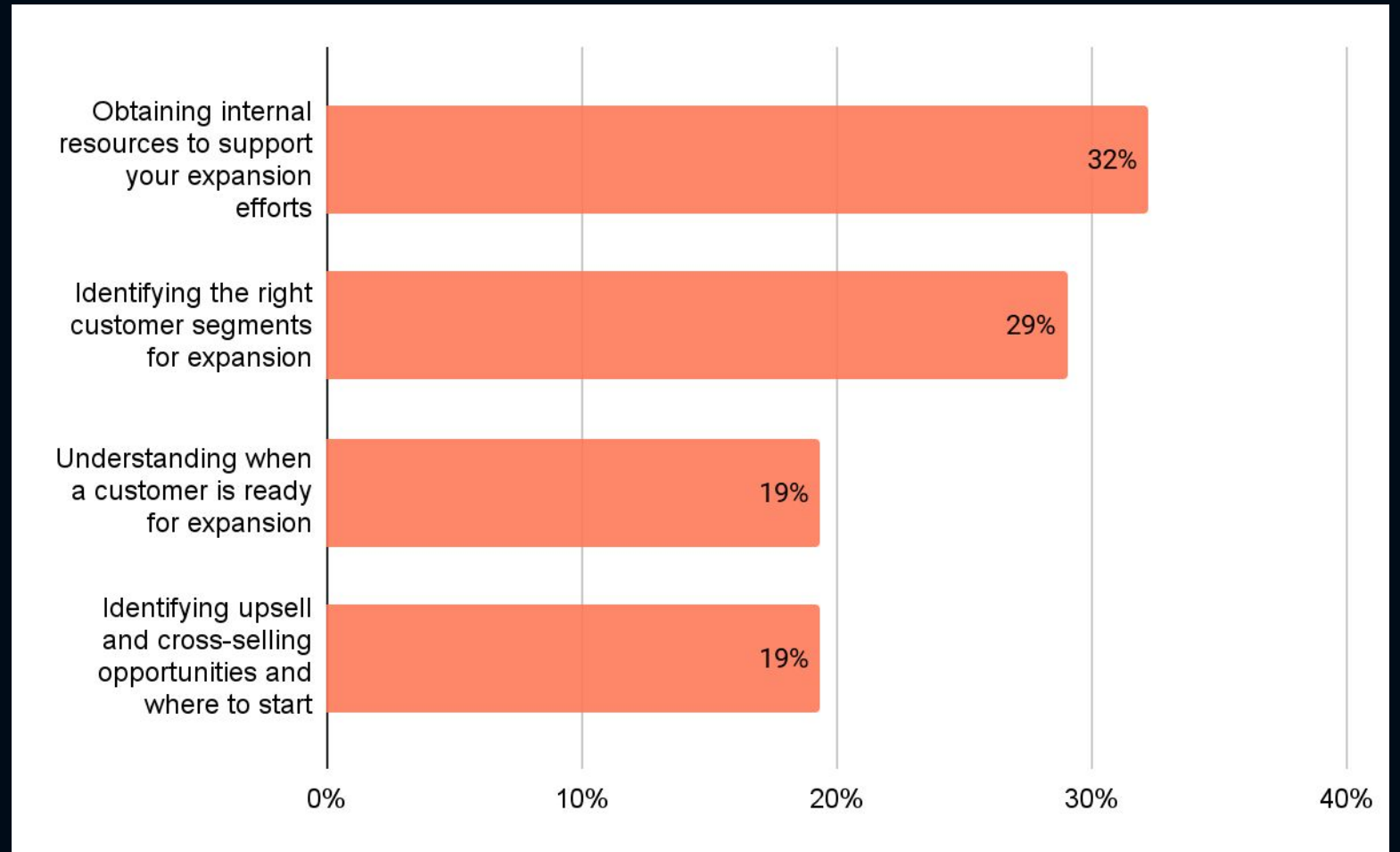
Lover of the Ocean.

Hiking, yoga, and scuba diving enthusiast.



# POLL RESULTS!

Which challenge do you face the most when it comes to customer expansion in your org?



Today you will learn,

Essential knowledge and strategies to develop successful customer expansion campaigns, leveraging data, to accelerate revenue growth from your existing customer base

# Agenda

- 1 Customer Expansion Marketing
- 2 Expansion Strategies
- 3 Campaign Execution
- 4 Metrics For Success
- 5 Group Exercise: Developing a Customer Expansion Campaign



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# Customer Expansion Marketing



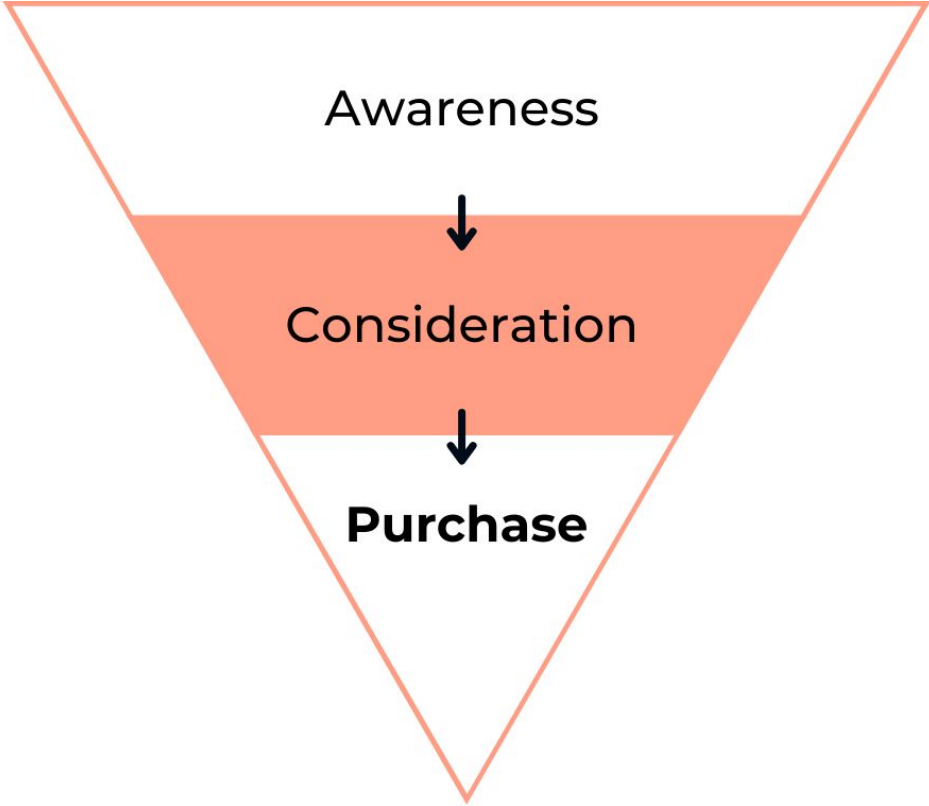
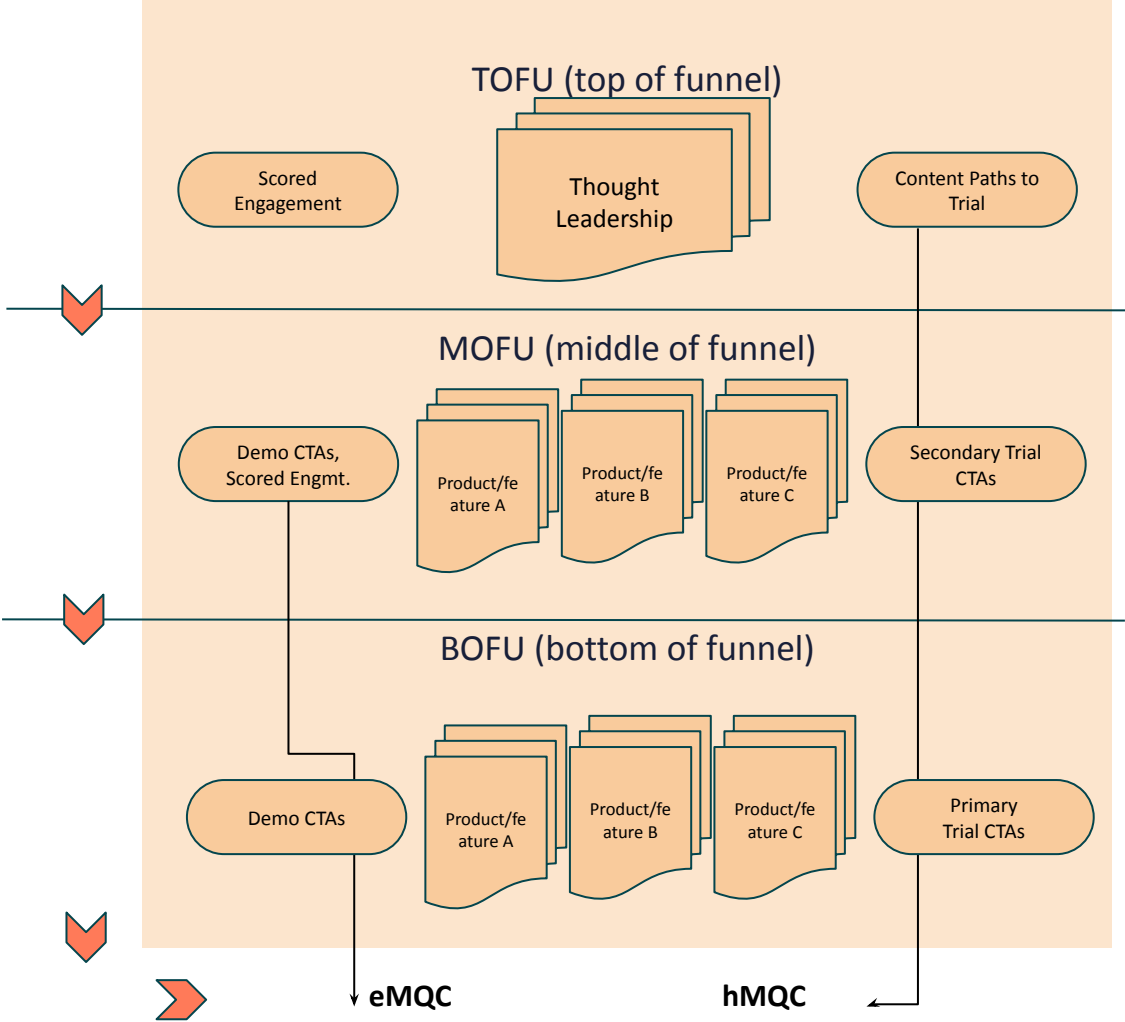




## Why it matters?

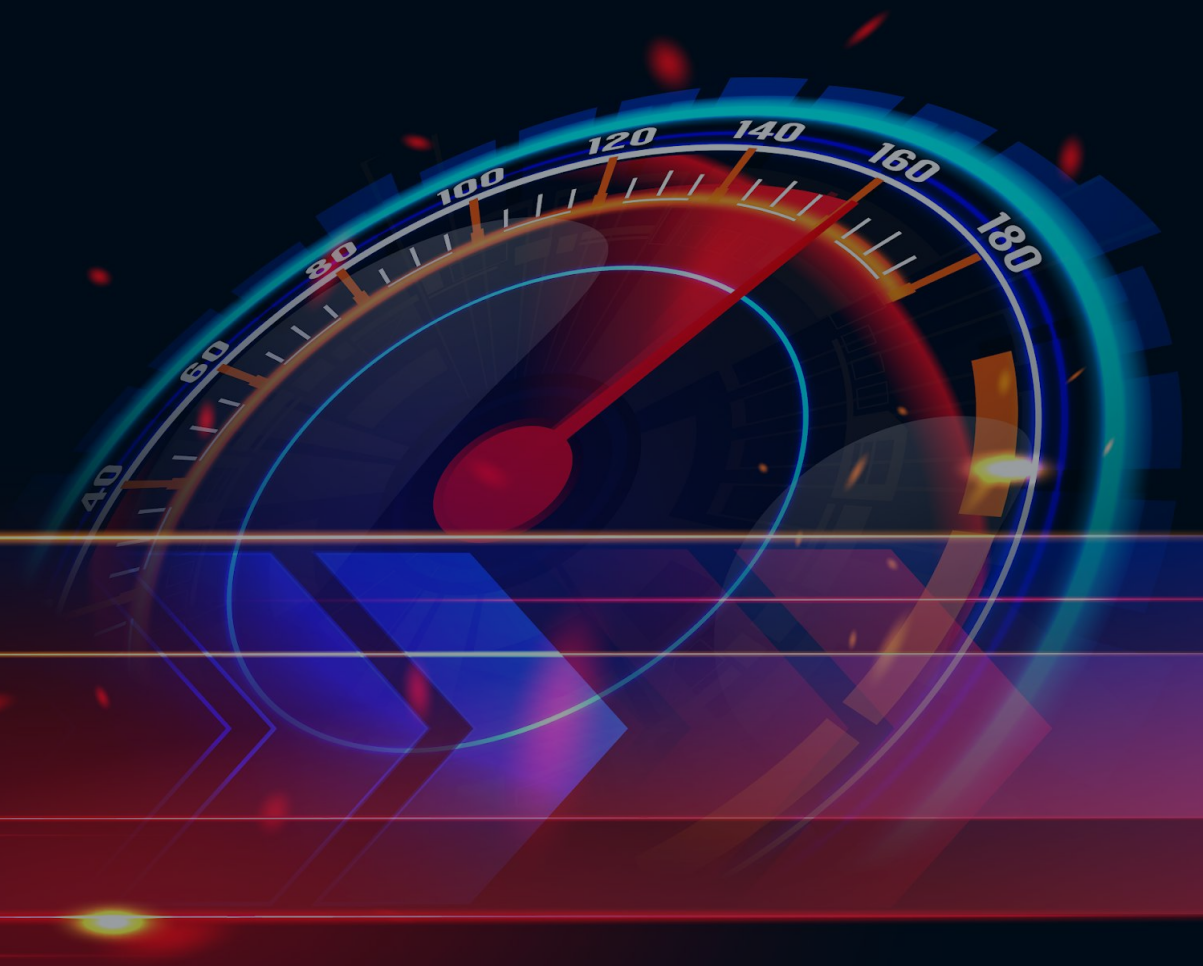
- More cost-effective to sell to existing customers than acquire new customers
- Increasing your NRR (Net Retention Revenue) or CLV (Customer Lifetime Value) contributes to sustained growth and profitability
- Fosters customer loyalty/stickiness and strengthens your brand

# The Expansion Marketing Funnel



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# Customer Expansion Strategies



## Two Expansion Motions

### Cross-Sell

- Additional products or services
- Selling into another business unit of an existing account

### Upsell:

- More licenses into an existing account
- Feature add-ons
- Plan upgrade

## Cross-Sell vs. Upsell



Cross-Sell



Upsell

# 3 Expansion Approaches

## Key Content / Moments

Thought leadership, awareness, research, analyst reports - position as industry leader

## Segmentation

Targeted messaging for upsell and/or cross-sell; rationale - better functionality, alignment with other cohorts/segments

## Product Enhancements

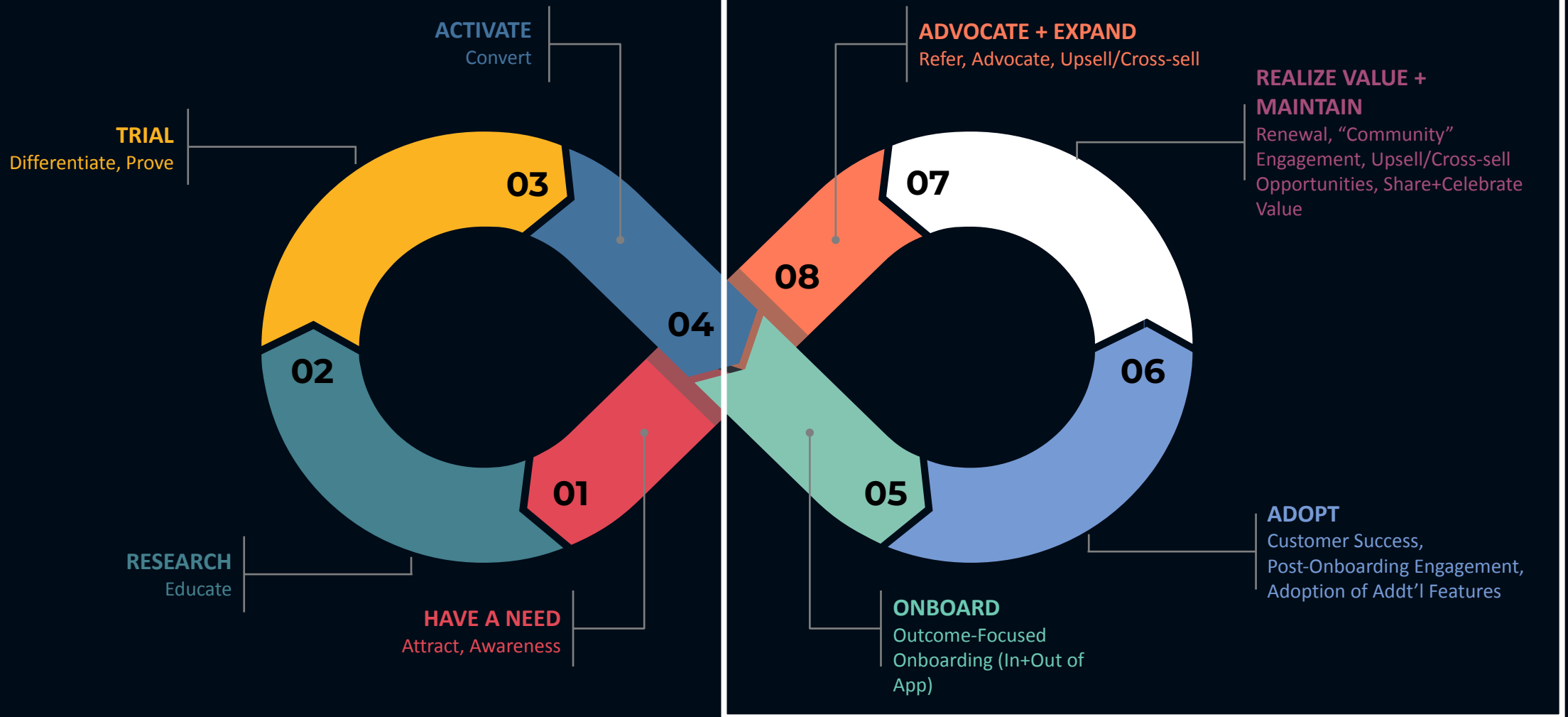
Key features and functionality, platform launch, big releases makes product more sticky

💡 Pro tip: Show them the value!

Without seeing **value** in what they already have,  
your customers won't buy more!

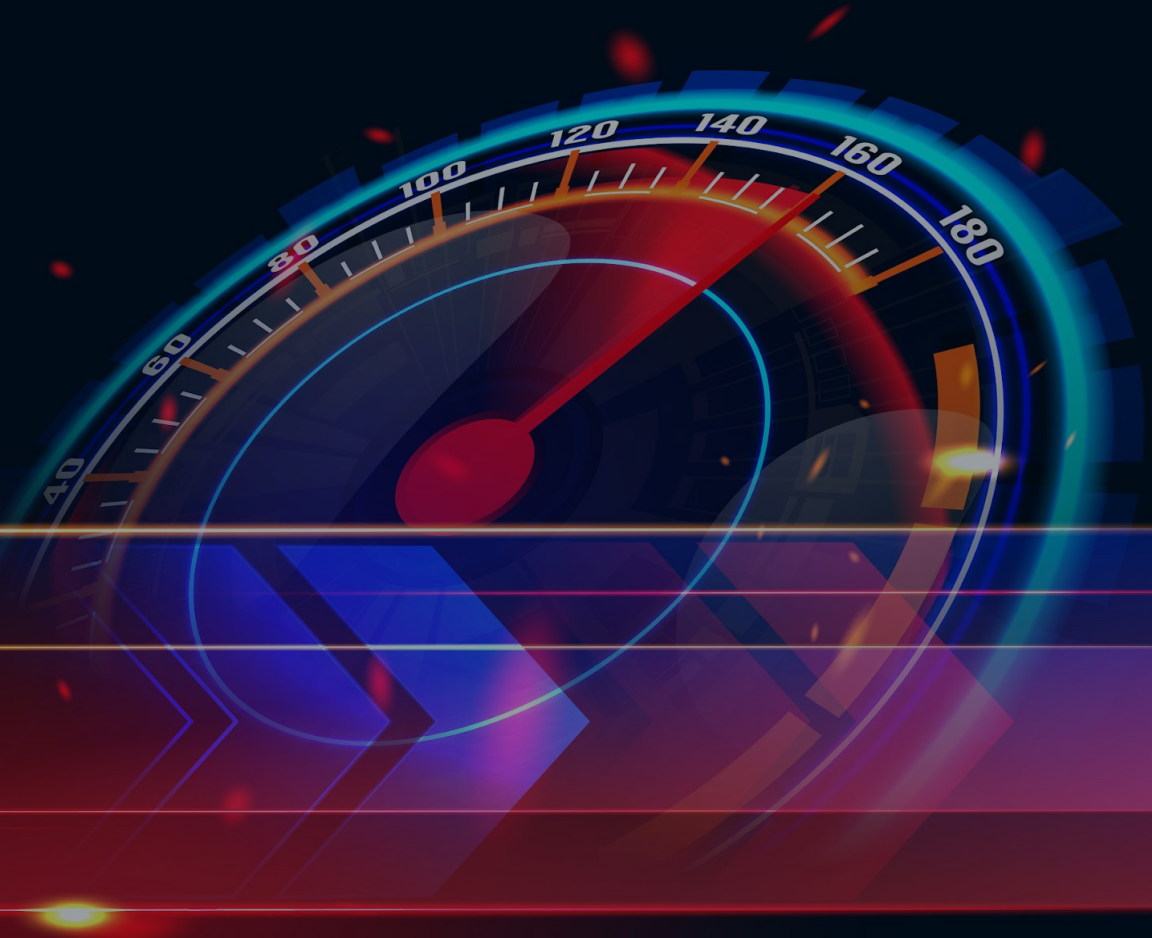


It's all about the whole journey!



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# Strategic Planning





# Customer Expansion Campaign Strategy Make-up



Determine your goals and objectives

- \$\$: Trials, demos, leads, pipeline gen, etc.
- Mktg: engagement, reach, CTR, etc.

Define the details

- Who: Customer segmentation
- What: Messaging/offer/personalization
- When: Campaign timeline
- Where: (Channels) email, social, etc.

Determine internal stakeholders

- PMM (criteria/segmentation/messaging)
- Product (in-app plays)
- CS/Sales (consistent/collaborate on comms & processes/segments)
- RevOps (metrics/scoring and tracking)
- Executive sponsor

Communicate and align

- Communicate with internal teams and align your campaign timeline and goals, etc.

Launch 🚀

- Launch your campaign(s) and watch the results roll in!

Measure and iterate

- Measure and analyze your results
- Make changes and try again



# Audience Segmentation

## Where to start:

- Work with Product Marketing to understand your overall ICP and “customerize it!”
- Build your business criteria
- Analyze data and build commonalities into cohorts
- Launch your first campaign and analyze the results

## Criteria examples:

- Shared characteristics
- Behaviors
- Firmographic/demographic data
- Verticals
- Job titles/roles
- Customer needs
- Product usage
- Number of users
- Current spend, etc.

*How to think of Audience Segmentation:*

*The process of categorizing your existing customers based on shared characteristics, behaviors, and needs to effectively tailor expansion strategies and deliver personalized value.*

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# Measuring Expansion Success



## Expansion Success Metrics

### Revenue Success

- Generated existing customer leads
- Influenced and generated pipeline
- # generated trials
- # scheduled demos
- Lead gen (Re-MQLs/MQCs/CMQLs/etc.)

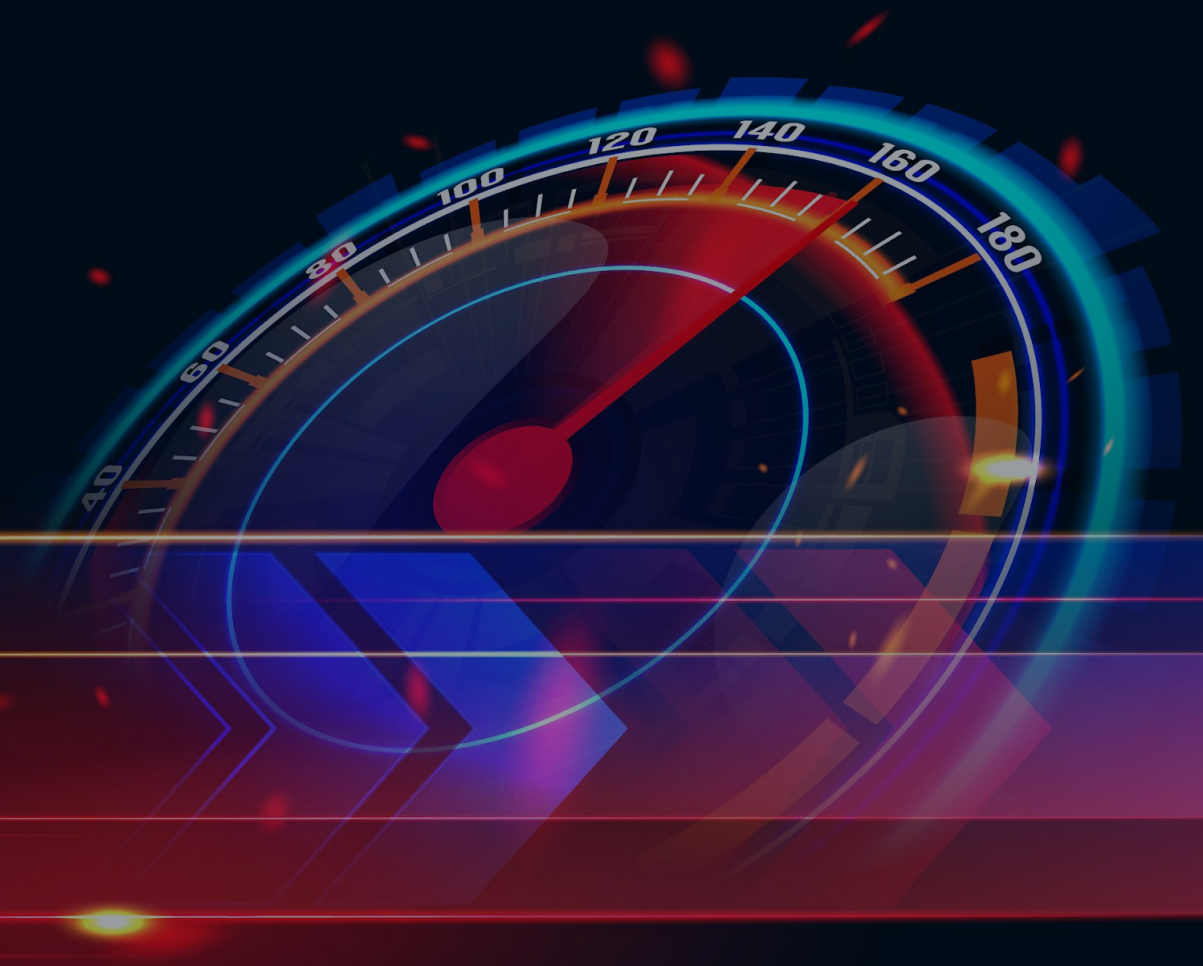
### Marketing Campaign Success

- Campaign and content engagement rates  
e.g., click-through-rate, open rate, etc.
- Audience reached
- Downloads/conversions (or landing page  
form completion)
- # of new opportunities



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# Workshop: Expansion Action Plan



### **Situation:**

Productivity4U, a SaaS productivity tool company, recently launched "Dashboards," an add-on product. Dashboards is designed for industrial customers (Construction, Development, Production, etc.) and is most valuable for mid-market and enterprise-sized customers. It comes with a per-license cost of \$5k plus \$20 per user. The average account has 50 users. It offers quick value realization, even without extensive integration, typically within 2 weeks.



### **Your Challenge:**

As the customer marketing department, you have a \$30k budget to promote Dashboards to the existing customer.

Your goal is to increase the revenue of Dashboards by 3% next quarter (a 3% increase is \$150,000 in revenue).

## Enterprise Use Case - Goals

Expansion KPIs	Campaign Targets
Opps	84
Closed-Won Deals	25
ACV (Average Contract Value)	<b>\$6,000</b>
Target	\$150,000

You need 25 deals to close to hit your revenue target. And you have an average opportunity close rate is 30%. So, if "Opportunities Needed = Deals Needed / Close Rate" (25/.30), you need to create 84 opportunities created.

Dashboards cost \$5,000 per license and \$20 per user. If the average account has 50 users, then the average contract value is  $\$5,000 + (50 * \$20) = \$6,000$ .

\*\* Q2 Company Expansion Targets: \$600,000, [Marketing Responsibility (25%): \$150,000]

### **What are our objectives?:**

Your goal is to increase the revenue of Dashboards by 3%

- 84 Opportunities
  - X hand-raisers (demo or trial request) [convert @ 50%]
  - X qualified leads [convert @ 20%]

## Campaign Description

- One-off cause marketing campaign for the holidays partnering with the National Humane Society!
- For every **demo** set within December for your new product, Dashboards, Productivity4U will donate \$100 (up to 20k).
  - That leaves an additional \$10k for other campaign elements/needs.

## Campaign Details (who, what, when, where, how?)

- Timeline: November - December 2024
- Budget: \$30,000
- Audience:
- Messaging:
- Campaign Elements/Content:
- Campaign Channels:

## Stakeholders (responsibilities)

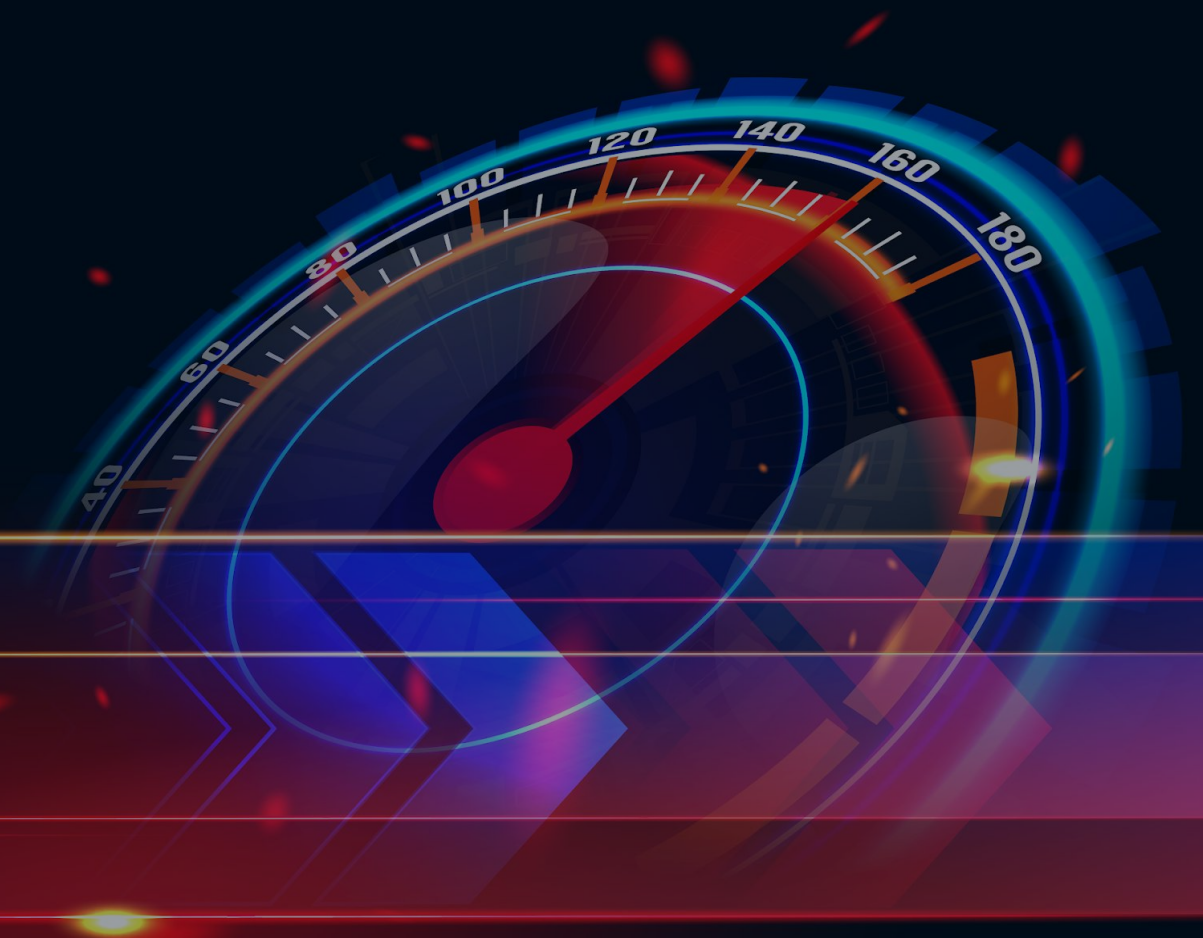
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## Metrics

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# APPENDIX

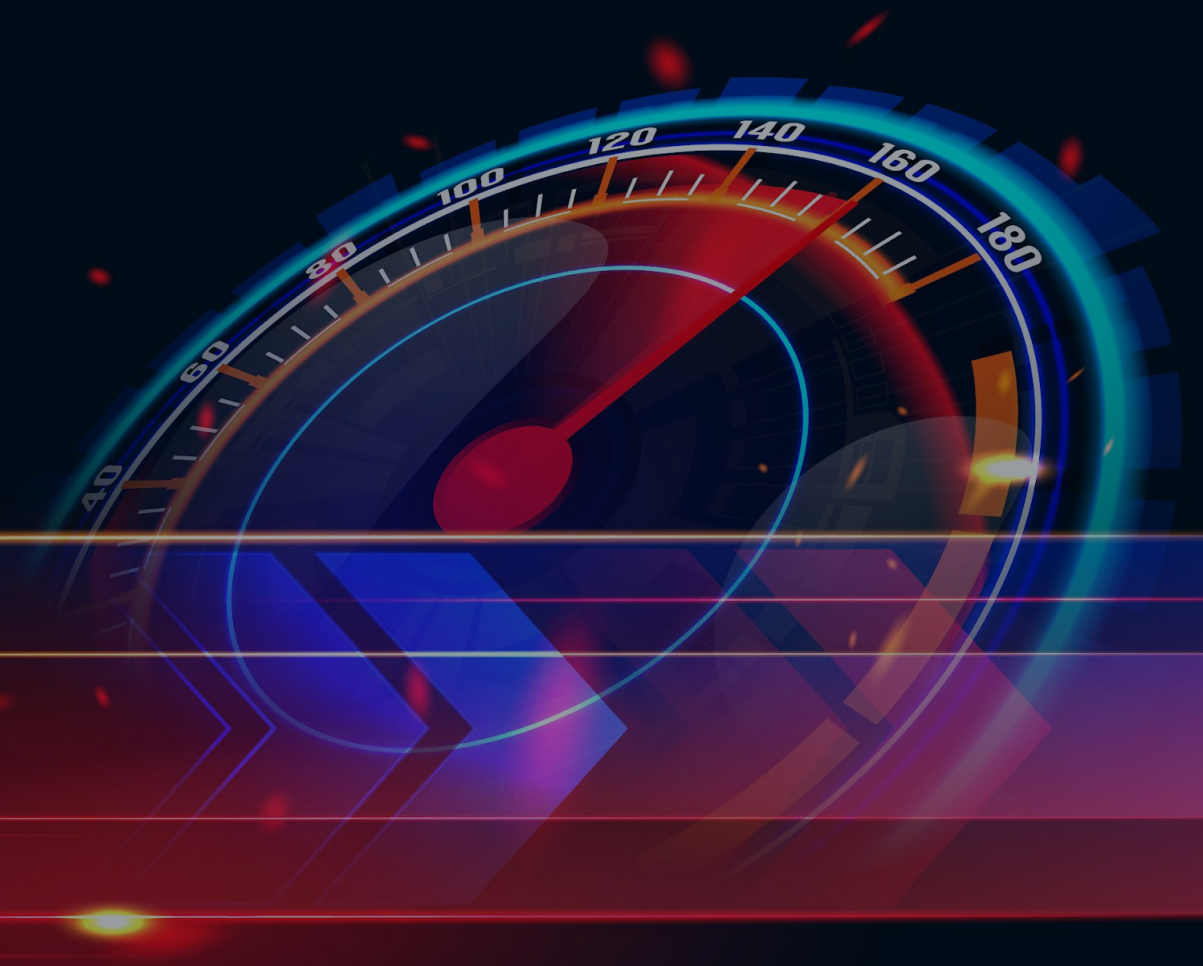


## Resources

- **Contact Information:**
  - Alyse Chiarello - [LinkedIn](#)
  - Rachel Ward - [LinkedIn](#)
- **Workshop Use Case:** [Enterprise, Contract Based](#)

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# APPENDIX: Strategies and Tactics



# Customer Lifecycle Marketing - Tactics

## Customer Onboarding (Implementation)

- Welcome Programs
- Customer Newsletter
- Community

## Customer Adoption

- Customer Newsletter
- User Conference
- Webinar Series
- Wrike Stars
- References Program

## Customer Retention (Realizing + Maintaining Value)

- Renewal Program
- NPS Program
- Champions Program
- Webinar Series
- Up-sell

## Customer Expansion + Advocacy

- Advocate: Champions Program, Online Reviews, References Program, Case Study/Customer Hero Video
- Expand: Thought Leadership, New Product/Releases, Webinar Series, Value/Benefits



# Customer Lifecycle Marketing - Measurement

## Customer Onboarding (Implementation)

- Aha moment!
- Usage
- New Community and University users

## Customer Adoption

- Feature usage
- Additional feature adoption
- Engagement

## Customer Retention (Realizing + Maintaining Value)

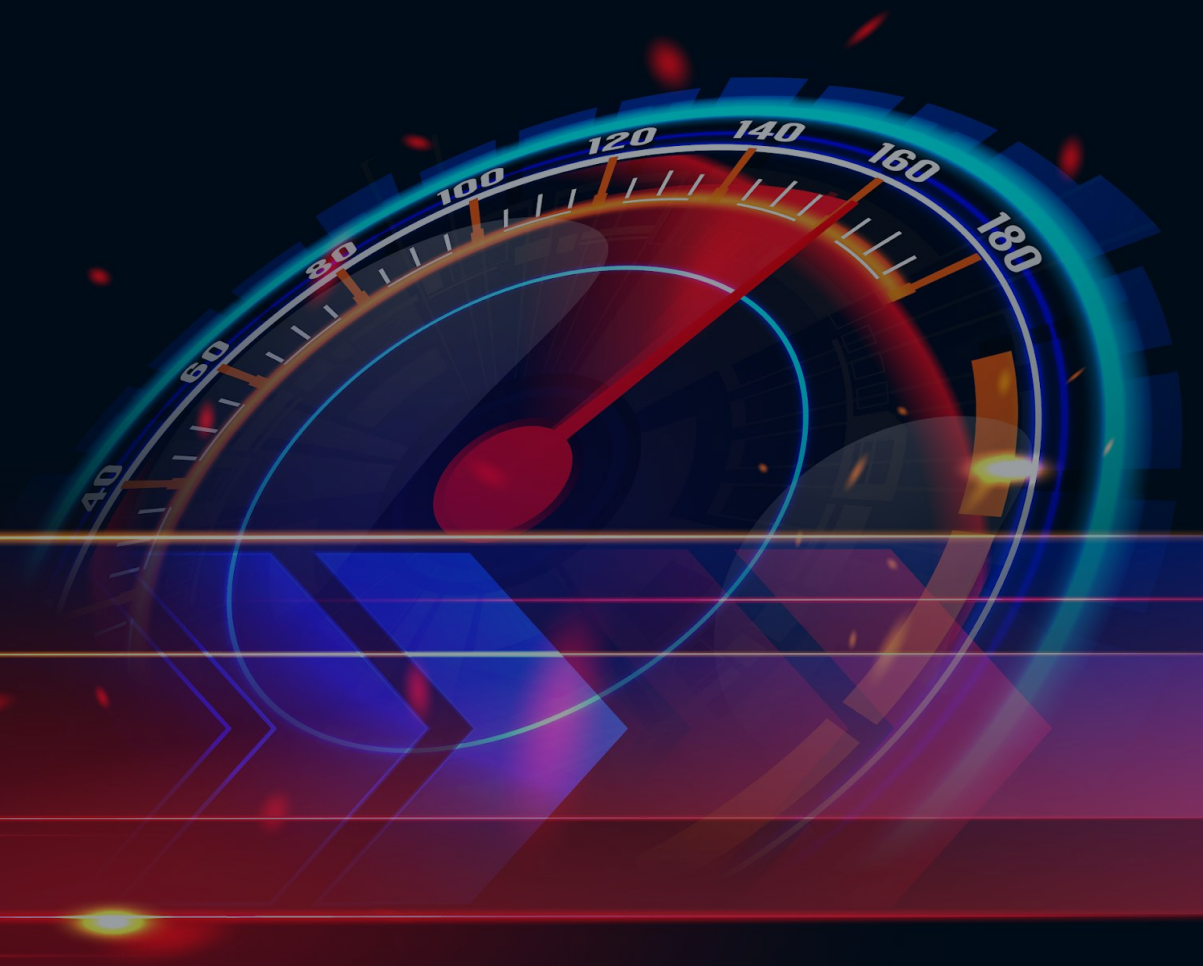
- NPS
- Health score
- Engagement
- Renewal (NDR, Retention, Churn)

## Customer Expansion + Advocacy

- Influenced pipeline (\$\$)
- Lead gen (MQLs/MQCs/CMQLs)
- Campaign performance (ie. email opens)
- Growth in key programs: advocate, community, reference, etc.

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# APPENDIX: Demand Generation



## Why Demand Generation?

As mentioned in the above presentation, your net new framework is going to be similar to your expansion framework.

Understanding your company's demand gen strategies and opportunity creation processes (as well as sales cycles) and aligning with your demand gen team can help you get started faster as you start to build out your expansion motion.



## A Demand Generation (Gen) Mindset

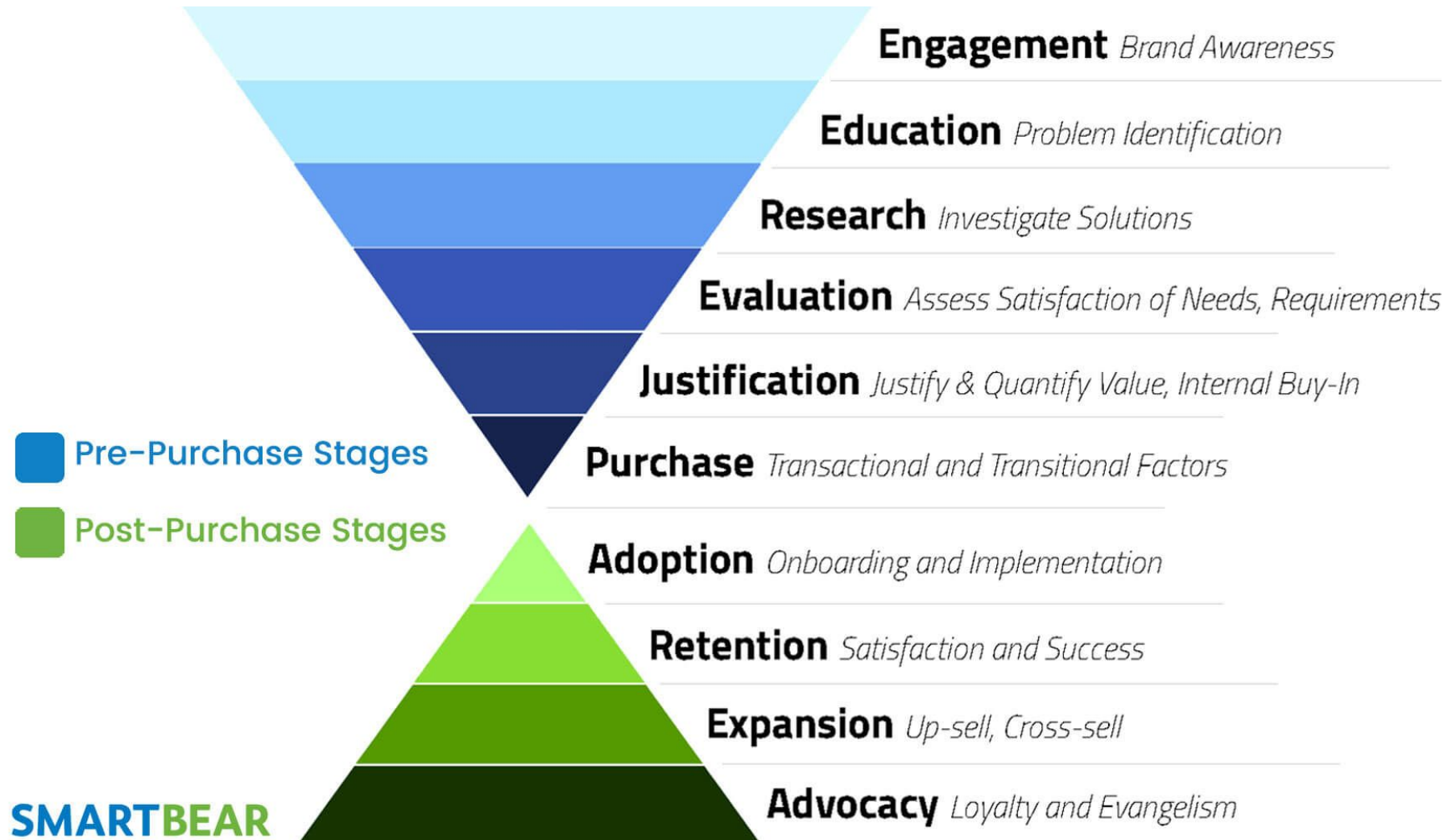
Why demand gen is important when thinking of customer expansion?

- It provides a structured approach to identify, nurture, and convert opportunities within your customer base, ensuring sustainable growth and revenue.

What is a Demand Gen flow?

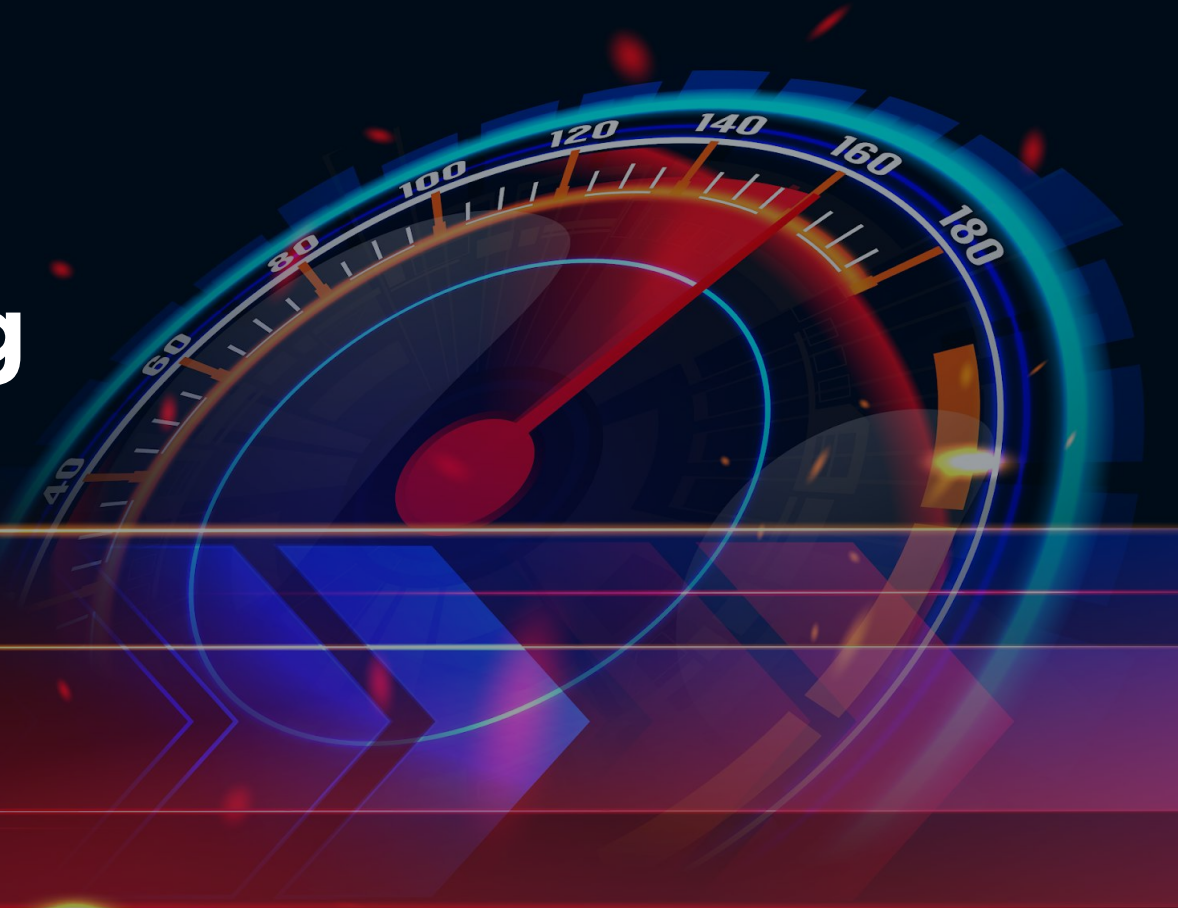
- The strategic process in marketing that involves identifying, engaging, nurturing, and converting potential customers into leads or sales. It typically includes steps like audience research, content creation, multichannel marketing, lead scoring, and analytics to generate demand for a product or service. The flow aims to attract, educate, and build relationships with prospects throughout their buying journey, ultimately driving revenue and business growth.

# Pre and Post-Sale Marketing Funnel Stages



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# APPENDIX: Customer Lead Scoring







# Lead Scoring Example

LEAD SCORE

0-29



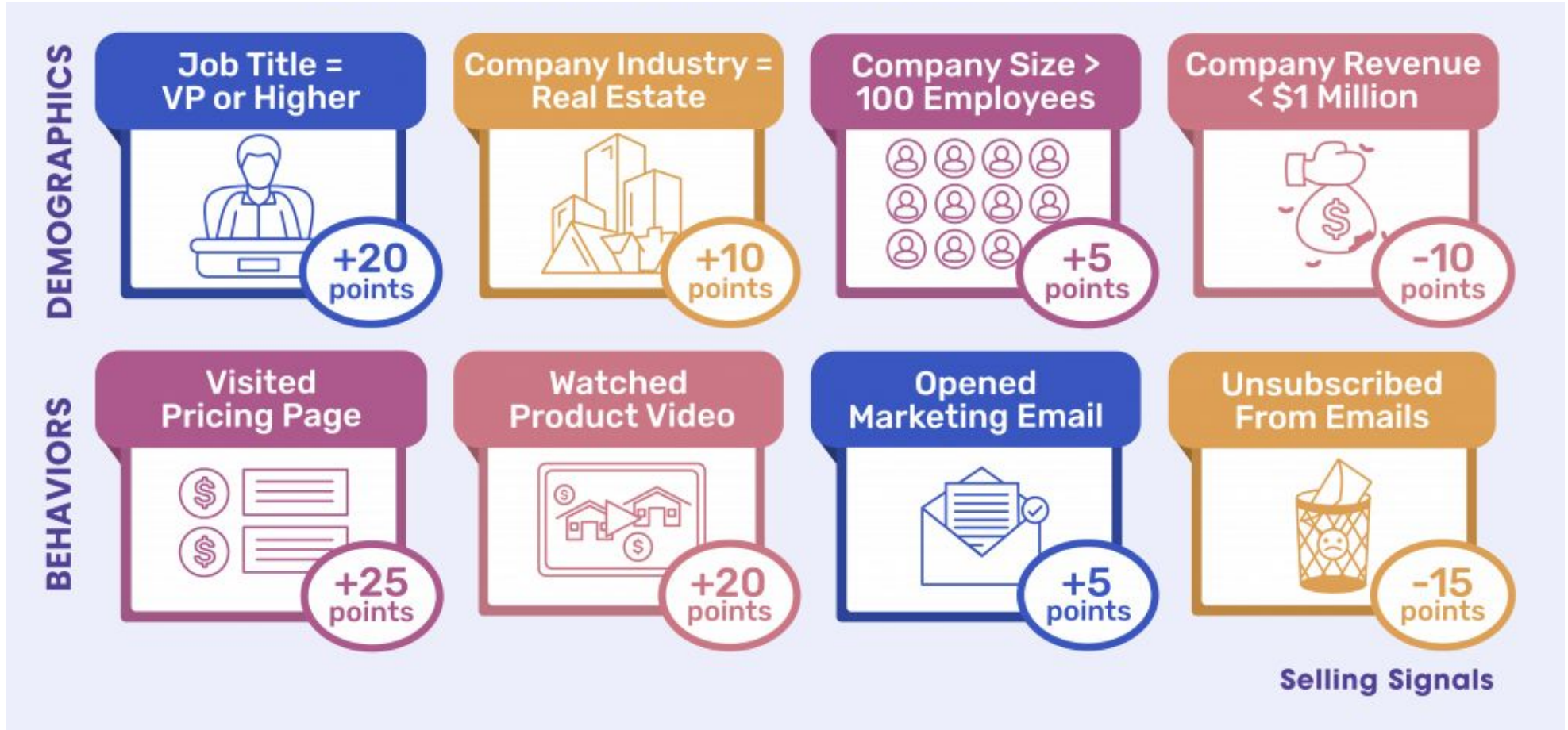
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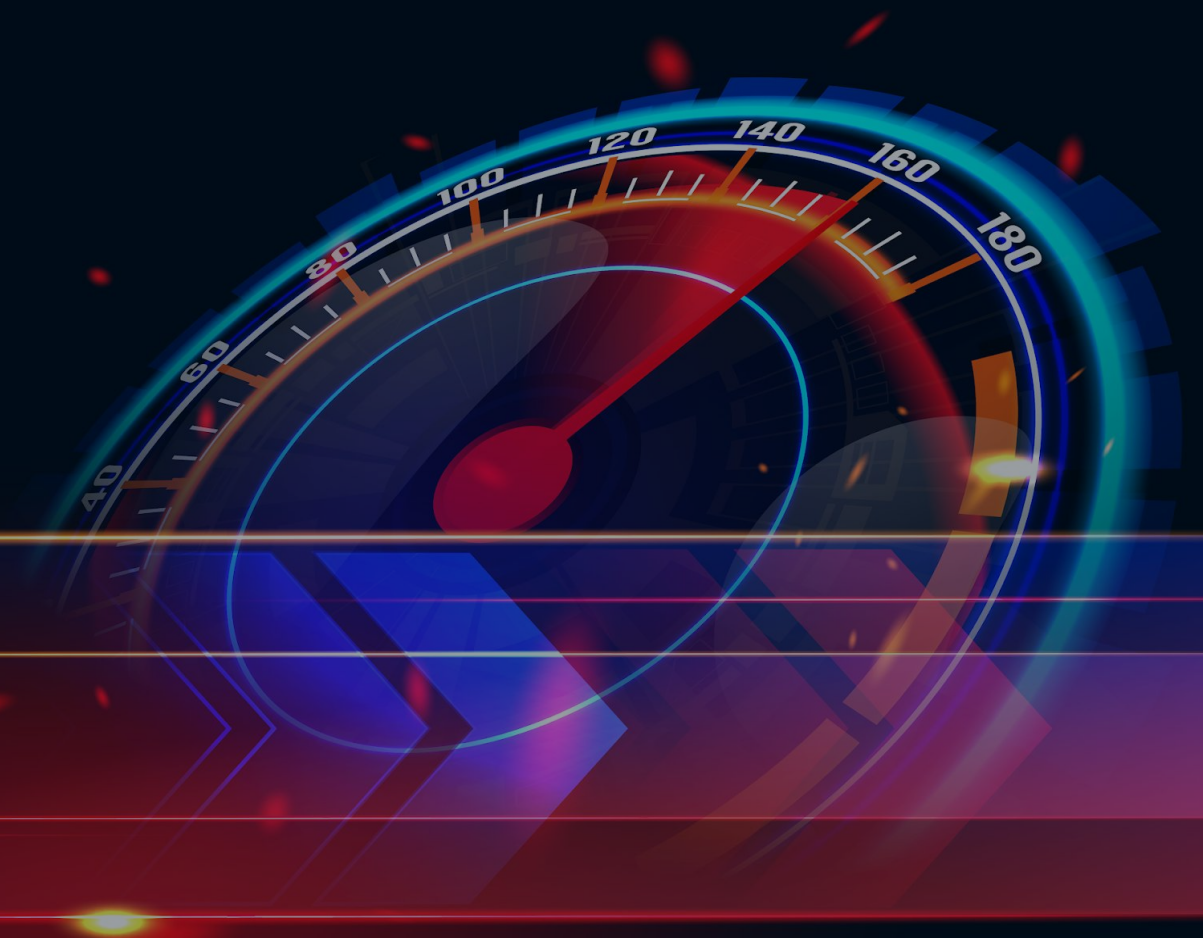


100+



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# APPENDIX: Nurtures



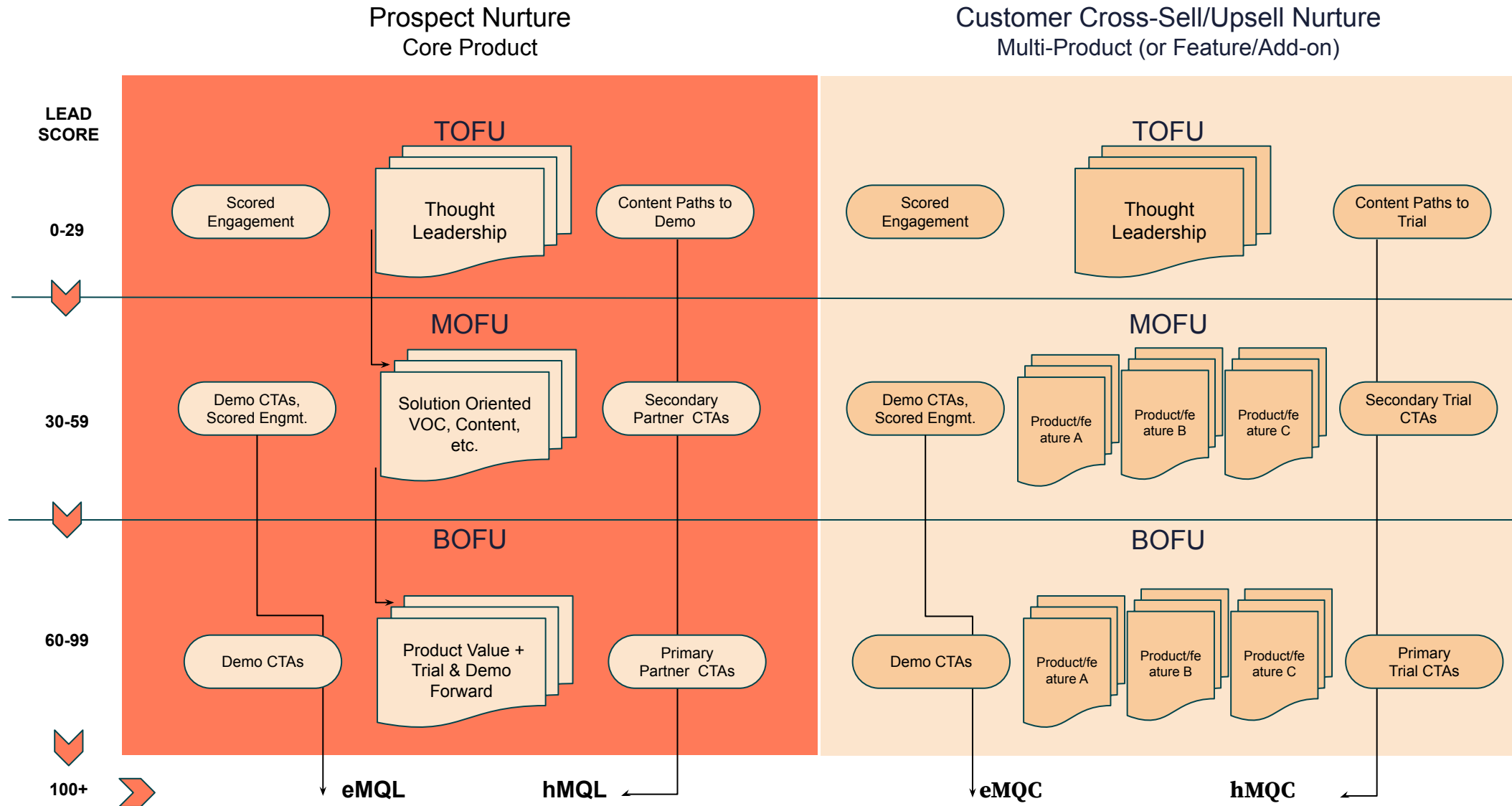
What is an evergreen nurture?

An evergreen, always-on email nurture campaign is a continuous, automated email marketing strategy designed to engage and educate prospects or customers over an extended period, without a defined end date.

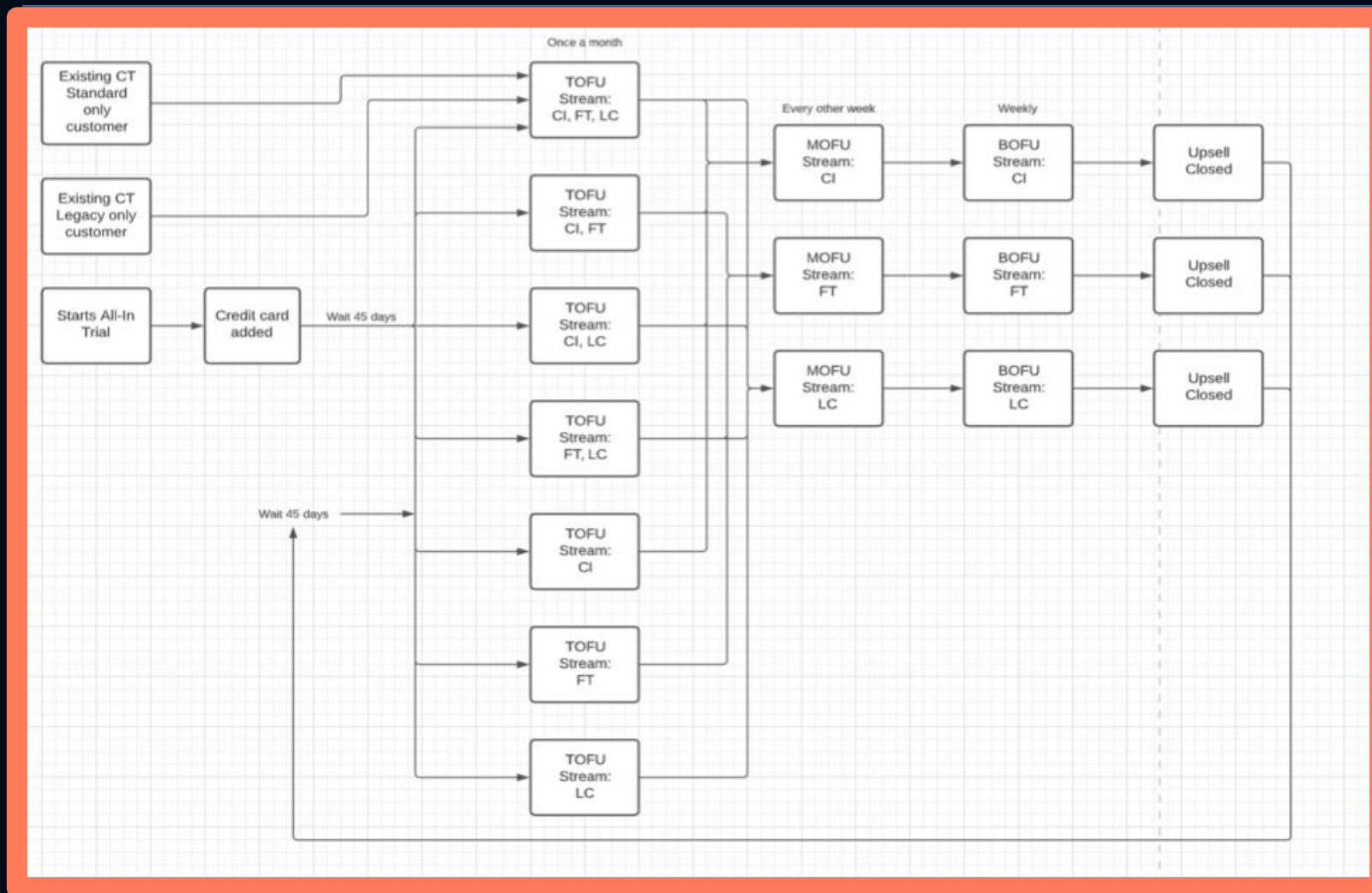
Why is it important?

- Consistent engagement
- Nurtures leads at all times (not only during key campaigns)
- Customer retention
- Efficiency
- Data insights
- Scalable

# Nurture Design and Structure



# Example Customer Expansion Nurture + Logic



\*\* Learn more in the comments

