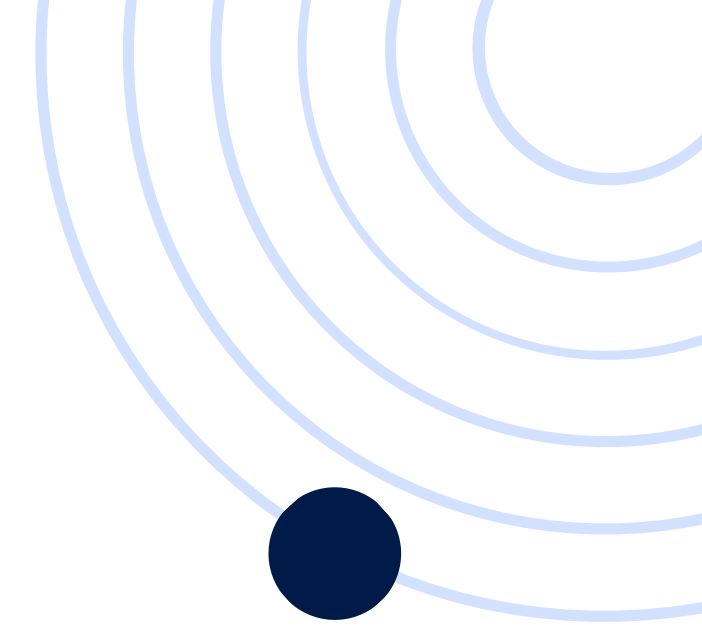


Worksheet: Cross-Sell Measurement Guide



Measurement Metrics

Activity Details

Impact

- Cross-sell revenue
- Number of customer accounts cross-sold to
- Amount of marketing sourced or influenced cross-sell pipeline

Describe the impact on business goals.

Output

- Number of opportunities created from cross-sell
- Number of accounts engaged with cross-sell activities
- Number of customer referrals into new buying centers

Describe the direct result of cross-sell activities.

Actions

- Response from campaign tactics
- Number of customer accounts with updated insights
- Number of new contacts identified within targeted customer accounts

Describe the actions taken.

Readiness

- Amount of enablement activity
- Number of completed buying committee member profiles
- Number of customer engagements

Describe the team's ability/preparedness to execute.

Worksheet: Upsell Measurement Guide



Measurement Metrics

Activity Details

Impact

- Customer satisfaction rate
- Retention rate
- Revenue growth from existing buying centers

Describe the impact on business goals.

Output

- Number of inquiries
- Participation rates
- Number of advocacy assets created
- Amount of opportunities created from upsell efforts

Describe the direct result of upsell activities.

Actions

- Number of events, webinars, and emails
- Amount of other elements delivered to existing customers that supported upsell activities

Describe the actions taken.

Readiness

- Number of contacts within the existing buying centers
- Amount of engagement

Describe the team's ability/preparedness to execute.