



## Lisa's Number One Secret for Upselling and Cross-Selling

### Description

We've said it numerous times before; we all know that it's easier to keep an existing client or customer than to go out and find brand new business. If you can upsell or cross-sell to your current client base, that's even better. How do you go about getting more business out of an existing client?

**Lisa's number one secret for upselling and cross-selling? Utilize a tool to help you visualize all of the additional contacts you can connect with and products or services you can offer!**

#### How it works:

1. Set up a spreadsheet (or utilize your CRM) and list all of the different services or products you offer across the top.
2. Down the side, list your current clients or customers.
3. Also, list any additional contacts within these organizations that you might be able to approach for other sales opportunities. For example, are there people working in different departments or divisions at the same company as your current client or at a sister or parent company that may also have an interest in your products or services? Make sure to add anyone who falls within this category to your spreadsheet as well.
4. Check off all of the products or services your current clients or customers are each currently utilizing, as well as the contacts within in each organization that you're working with.

You now have a visual that allows you to immediately see what other opportunities there are for you within each company to both sell more to your current clients or customers and to reach out to additional contacts within their organization. When it makes sense to do so, you can then focus on pursuing these other opportunities. It's that simple!

Utilizing this chart can help you upsell and cross-sell your existing clients or customers, adding more value to each relationship and building your revenue without having to spend time and energy seeking outside new business!

### Category

1. Articles and Blogs

## 2. resources

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