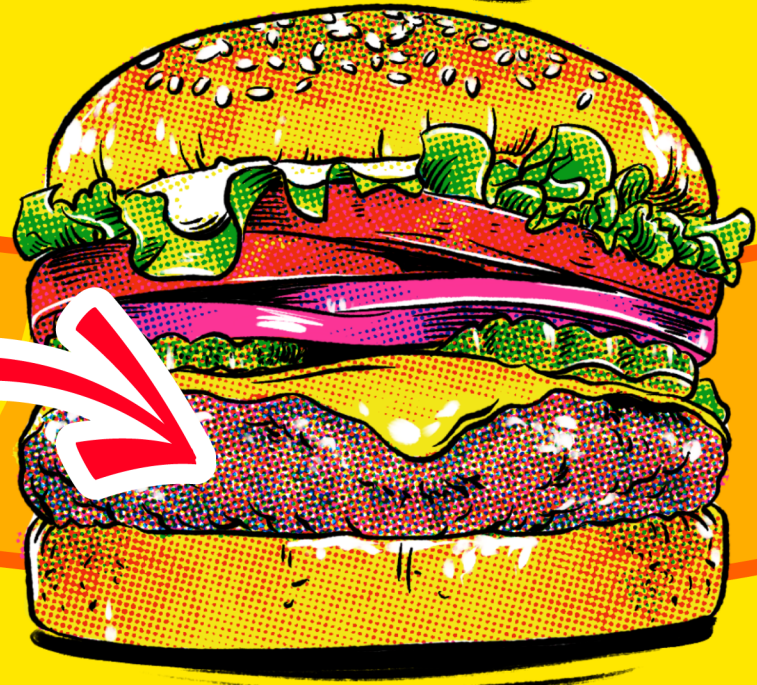
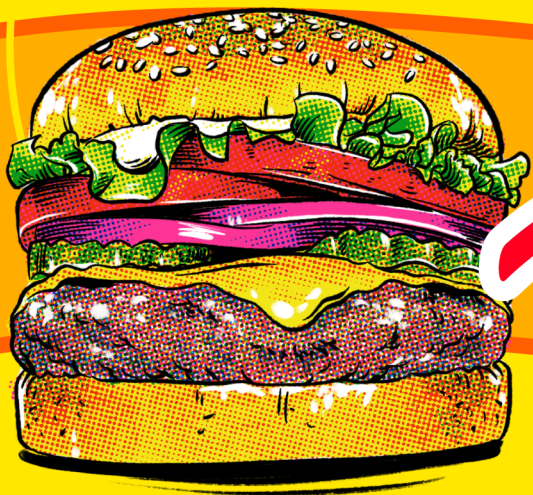




#3 2022 ED.

# HOW TO INCREASE UPSELLS *and* CROSS-SELLS *with* Contact Scoring



# HOW TO INCREASE UPSELLS AND CROSS-SELLS WITH CONTACT SCORING

If you want to increase your average purchase value and sell more to the existing audience that you've already worked hard to acquire, leveraging contact scoring to increase upsells and cross-sells is the way to go.

Want to see exactly how (and why) you should use contact scoring to increase upselling and cross-selling and why this is so crucial for your business? Let's take a look.

## GET STARTED WITH UPSELLING AND CROSS-SELLING

Upselling and cross-selling are strategies that every business and salesperson needs to know if they want to sell more to their existing customers and get as much value from each client as possible.

| UPSELLING   | CROSS-SELLING  |
|---|--|
| <p>Upselling is the process of trying to sell users items that are at a higher price point than what they've either already purchased or what they're considering purchasing.</p> <p><b>Example:</b></p> <p>Zapier is automation software that connects different third-party apps, and while you can do a lot with their base plans, there are limits. They have several "premium" apps that require upgraded plans in order to use, which is a great way to upsell higher plans to existing customers who already use the tool.</p> | <p>Cross-selling is the process of selling a different product or products to an existing customer based on what they've purchased before.</p> <p><b>Example:</b></p> <p>Semrush offers a keyword research and SEO optimization suite of tools. Plan upgrade is only useful for adding more team members or tracking more sites, so upselling wouldn't work. However, they use cross-selling to advertise their content creation platform, where customers can order content like site pages or press releases ready-made.</p> |

# WHY UPSELLING AND CROSS-SELLING ARE SO VITAL

There are a few core reasons why all businesses should take advantage of upselling and cross-selling. These include the following:

## Your average order value goes up

This is the simplest and most significant reason why upselling and cross-selling are so essential to any marketing strategy, including for B2B businesses.

Whether customers are purchasing higher-cost products or they're purchasing additional items, it means that your order values are increasing.

This can be significant. In 2016, [Amazon attributed 35% of their growth](#) to cross-selling.

## It's easier to sell to existing customers than to acquire new ones

Warm audiences are easier to convert than cold audiences or those who haven't yet purchased from you.

Focusing on increasing your total purchases from existing customers instead of simply putting all your effort into acquiring new customers can mean [faster revenue acceleration](#) before you know it.

## Upselling and cross-selling lead to improved retention

When done correctly, upselling and cross-selling can lead to improved client retention.

You'll increase the perceived value of your business because they may be working with you to fill several needs at once; this means it would be more difficult to switch to a competitor.

## The customer lifetime value is improved

Your lifetime value (LTV) tells you how valuable the average customer is, and both what they purchase and how often are essential factors in the equation here.

It [costs anywhere from 5-25x more](#) to acquire a new customer than to retain an existing one. That's a crucial metric to consider. And when you retain customers longer, their LTV goes up.

## ENTER CONTACT SCORING

Contact scoring is the process of looking at different qualities, actions, and behaviors of an individual contact and assigning them a score. This score can assess whether they're a good fit for upselling or cross-selling opportunities, helping your sales team to identify deals before it's too late.

Contact scoring tools can allow you to look at specific data points for existing contacts, including both leads and customers, and assign scores based on each.

You can track data like:

- Have they visited your support center or contacted customer service?
- Are they opening your emails?
- Have they paused their account for one month?
- How often are they using the tool or reaching account-usage limits?

Quality contact scoring tools can take this information into a strategic sales approach using a co-dynamic method.

Using a co-dynamic method can help you understand who your best prospects and high-value customers are. You can learn more about the customer cycle to optimize it for upselling and cross-selling opportunities.

## CONTACT SCORING IN ACTION: TWO EFFECTIVE DATA-DRIVEN (& DATA-FUELED) UPSELLING & CROSS-SELLING CONTACT SCORING MODELS

Contact scoring is only as valuable as the models used to give you those scores, and we're confident in both our upselling and cross-selling models here at Breadcrumbs.

Let's take a look at the models we use to help your team reliably identify (and convert!) upselling and cross-selling opportunities.

# THE TRIED-AND-TRUE UPSELLING CONTACT SCORING MODEL TEMPLATE

Our upselling contact scoring model takes the following data points into account:

- **Your NPS score to assess fit.** Your Net Promoter Score tells you how likely customers are to recommend your business to others. This is a direct reflection of customer satisfaction. If customers have given you a high score, they're going to be a better fit.
- **The number of support tickets logged to assess fit.** The more support tickets a customer has logged, the lower your score.
- **Visits to your support center to assess activity.** The higher, the better, and the lower the number of visits, your score will be lower.
- **Number of support tickets escalated to assess activity.** The higher the number of support tickets that have been escalated, the lower your score will be. This is often a direct reflection on the customer experience.
- **How they're engaging with content like webinars or optional content downloads to assess activity.** Strong engagement will give you a higher score and can include signing up for and attending webinars or conferences, downloading lead magnets, and more.
- **How they're engaging with the product to assess activity.** The higher the engagement, the better your score will be. When was their last login, and how close are they to reaching their plan's threshold?

# HERE'S WHAT THE UPSELLING CONTACT SCORING MODEL LOOKS LIKE IN BREADCRUMBS

The screenshot displays the 'Upsell Scoring' configuration page in Breadcrumbs. The interface is divided into two main sections: '1. Fit Categories' and '2. Activity Categories'. Each section includes a description, a '+ NEW CATEGORY' button, a 'SORTING' dropdown set to 'Weight Descending', and a list of categories with their respective weights and mapping details.

**1. Fit Categories**

Fit Categories are used to score your contacts based on who they are. Use Firmographic or demographic data to identify your best contacts.

- Last NPS Score**: Weight 50%. Mapping: Hubspot Connection → Last NPS Score. Matching values range: + 0-6 (-25%), + 7-8 (75%), + 9-10 (100%).
- # Of Support Cases**: Weight 50%. Mapping: Hubspot Connection → # Of Support Cases. Matching values range: + 0-1 (100%), + 1-5 (75%), + 6-10 (50%).

**2. Activity Categories**

Activity Categories are used to score your contacts based on how they are interacting with you over time. An action taken today is not as valuable as an action taken one month ago.

- Viewed Support & Resource Centre**: Weight 40%. Absolute Decay: 15%, Interval Rate: 45 DAYS, Frequency: 1 TO 5. Matching Rules Event: Hubspot Connection → Page Visits. Url: \*/support/\*, \*/resources/\*
- # Of Case Escalations**: Weight 30%. Absolute Decay: 10%, Interval Rate: 45 DAYS, Frequency: 1 TO 5. Matching Rules Event: Hubspot Connection → Conversions. Conversion name: 0, 1
- Attended Customer Webinar**: Weight 30%. Absolute Decay: 10%, Interval Rate: 30 DAYS, Frequency: 1 TO 5. Matching Rules Event: Hubspot Connection → Conversions. Conversion name: Webinar Registration

Get all the data points of your upselling model in Breadcrumbs and easily identify and edit weight, value and decay for each fit and activity category and have full control on what makes up your score before activating it.

When you want to push customers to upgrade their plan or purchase higher-level products, you want to time your offers well. Looking for contacts who are actively engaged with your content and your plan is a good sign.

SCORING MODEL CONFIGURATION  
Upsell Scoring

OVERVIEW 1 FIT CATEGORIES 2 ACTIVITY CATEGORIES 3 ADVANCED SETTINGS

ACTIVITY CATEGORIES

- + NEW CATEGORY
- 40% VIEWED SUPPORT & RESOURCE CENTRE
- 30% # OF CASE ESCALATIONS
- 30% ATTENDED CUSTOMER WEBINAR

CATEGORY DETAILS

NAME: Attended Customer Webinar WEIGHT (0% AVAIL.): 30%

ANALYTICS EDIT

Event Configuration

Absolute decay: ABSOLUTE DECAY 10% INTERVAL RATE 30 days

Min Frequency: MIN FREQUENCY 1 MAX FREQUENCY 5

Matching event: PLATFORM Hubspot Connection EVENT Conversions

Rules configuration: All rules must match (AND)

KEYS EVENT

Form Name: Webinar Registration Add values separated by comma...

+ ADD RULE

Calculated Score: 30%

This will create 5 periods, 30 days each, and assign a score if there is/are at least 1 events and max 5. For each period we move back in time, the assigned score will be reduced by -10%

Clearly identify customers who are engaging right now by assigning weight, frequency, and time decay for each activity customers do on your website and product.

Someone who continually hits towards the top threshold of their plan is a great candidate for an upsell, especially if they've also given you a highly-rated NPS score and haven't submitted many support tickets. They're happy with the plan; they just need more.

**FIT CATEGORIES**

- + NEW CATEGORY
- 50% LAST NPS SCORE
- 50% # OF SUPPORT CASES

**CATEGORY DETAILS**

NAME: Last NPS Score | WEIGHT (0% AVAIL): 50%

ANALYTICS | EDIT

This category checks data from:

PLATFORM: Hubspot Connection → FIELD: Last NPS Score

+ ADD MAPPING

This category will look for a RANGE within the mapped fields and assign a score based on the values matched. Score can be negative. If no match is found the score will be 0.

| RANGE DEFINITION (LOWER BOUND - UPPER BOUND) |    | SCORE % |
|--|----|---------|
| 0  | 6  | -25 %   |
| 7  | 8  | 75 %    |
| 9  | 10 | 100 %   |

+ ADD VALUE

Determine which contacts are the best fit for your upsell pitch by assigning a weight to each fit category and, within a single category, giving a positive or negative value to increase or decrease the overall scoring for each category.

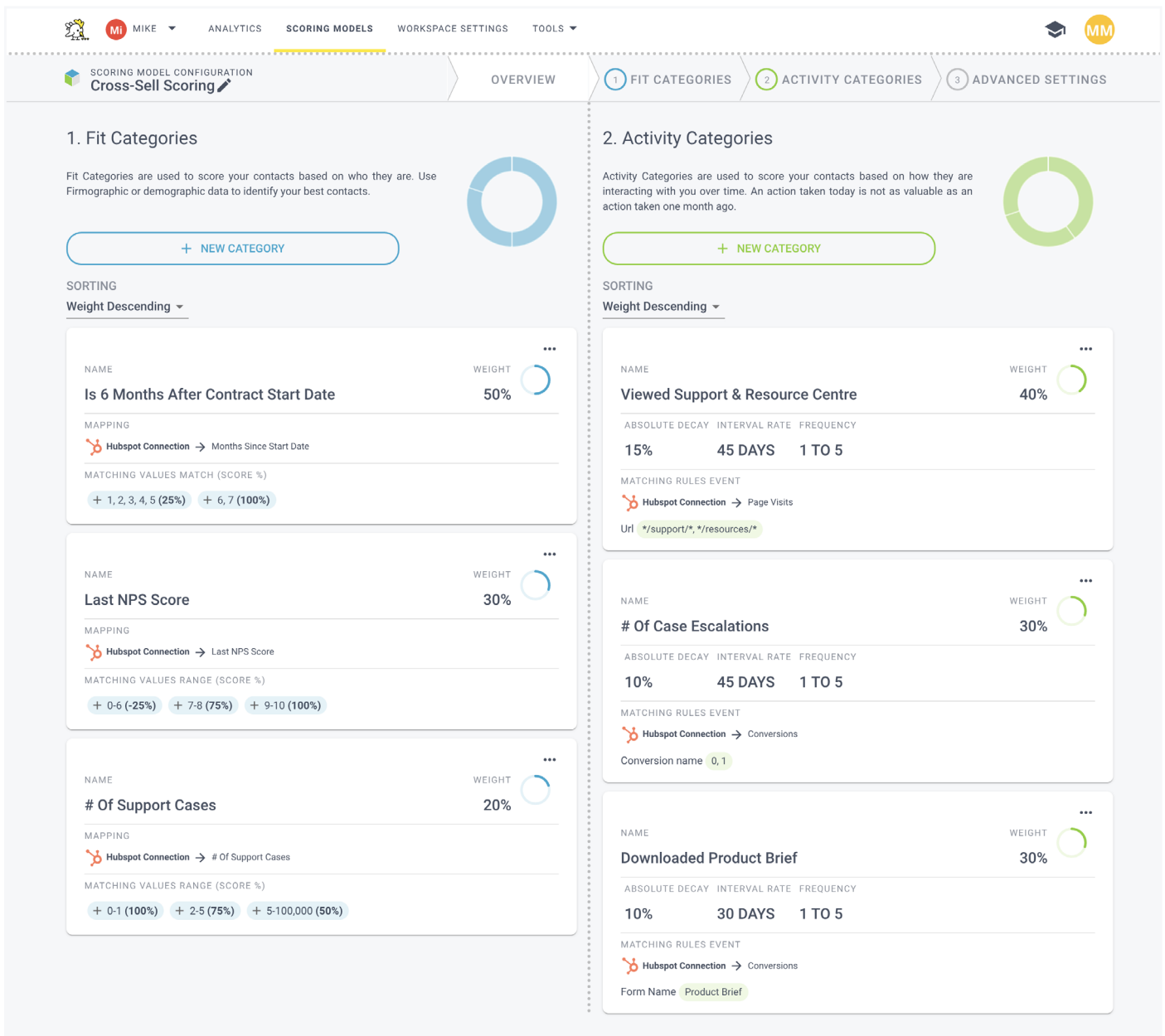


# THE TRIED-AND-TRUE CROSS-SELLING CONTACT SCORING MODEL TEMPLATE

Our cross-selling model template (which is fully customizable!) considers the following data points:

- **Your NPS score to assess fit.** Your Net Promoter Score is a direct reflection of customer satisfaction. If this score is higher, that's good; if it's lower, that's not good.
- **The number of support tickets logged to assess fit.** The more support tickets a customer has logged, the lower your score will be.
- **The number of months since a contract's start date.** If clients have been with you for at least six months, that's a good time to start to cross-sell. That way, you aren't selling too aggressively too fast, and it gives them time to realize how much value they get from the tool they've already signed up for.
- **Visits to your support center to assess activity.** Users who are more engaged visit your support center more often in many cases. A higher score here is a good thing.
- **Number of support tickets escalated to assess activity.** You want fewer support tickets to be escalated because this can reflect a negative customer experience.
- **Downloads of product briefs for activity.** You want a higher score here, as it shows that users are actively engaged in using your products and want to get more out of them. This is particularly true if they're downloading product briefs for products or services they haven't purchased yet.

# HERE'S WHAT THE CROSS-SELLING CONTACT SCORING MODEL LOOKS LIKE IN BREADCRUMBS



**SCORING MODEL CONFIGURATION**  
Cross-Sell Scoring

OVERVIEW | 1 FIT CATEGORIES | 2 ACTIVITY CATEGORIES | 3 ADVANCED SETTINGS

### 1. Fit Categories

Fit Categories are used to score your contacts based on who they are. Use Firmographic or demographic data to identify your best contacts.

+ NEW CATEGORY

**SORTING**  
Weight Descending

| NAME  | WEIGHT |
|---|--------|
| Is 6 Months After Contract Start Date                 | 50%    |
| MAPPING: Hubspot Connection → Months Since Start Date |        |
| MATCHING VALUES MATCH (SCORE %)                       |        |
| + 1, 2, 3, 4, 5 (25%) + 6, 7 (100%)                   |        |
| Last NPS Score  | 30%    |
| MAPPING: Hubspot Connection → Last NPS Score          |        |
| MATCHING VALUES RANGE (SCORE %)                       |        |
| + 0-6 (-25%) + 7-8 (75%) + 9-10 (100%)                |        |
| # Of Support Cases                                    | 20%    |
| MAPPING: Hubspot Connection → # Of Support Cases      |        |
| MATCHING VALUES RANGE (SCORE %)                       |        |
| + 0-1 (100%) + 2-5 (75%) + 5-100,000 (50%)            |        |

### 2. Activity Categories

Activity Categories are used to score your contacts based on how they are interacting with you over time. An action taken today is not as valuable as an action taken one month ago.

+ NEW CATEGORY

**SORTING**  
Weight Descending

| NAME   | WEIGHT |
|--|--------|
| Viewed Support & Resource Centre                                 | 40%    |
| ABSOLUTE DECAY: 15%   INTERVAL RATE: 45 DAYS   FREQUENCY: 1 TO 5 |        |
| MATCHING RULES EVENT: Hubspot Connection → Page Visits           |        |
| Url: */support*/*/resources/*                                    |        |
| # Of Case Escalations  | 30%    |
| ABSOLUTE DECAY: 10%   INTERVAL RATE: 45 DAYS   FREQUENCY: 1 TO 5 |        |
| MATCHING RULES EVENT: Hubspot Connection → Conversions           |        |
| Conversion name: 0, 1  |        |
| Downloaded Product Brief   | 30%    |
| ABSOLUTE DECAY: 10%   INTERVAL RATE: 30 DAYS   FREQUENCY: 1 TO 5 |        |
| MATCHING RULES EVENT: Hubspot Connection → Conversions           |        |
| Form Name: Product Brief   |        |

Get all the data points of your cross-selling model in Breadcrumbs and easily identify and edit weight, value and decay for each fit and activity category and have full control on what makes up your score before activating it.

Breadcrumbs allows you to customize how you want to rank different factors here (such as setting different thresholds for NPS scores and how it impacts ranking) so that you can truly customize your scoring system to your business.

The screenshot displays the 'SCORING MODEL CONFIGURATION' interface for 'Cross-Sell Scoring'. The navigation bar includes 'ANALYTICS', 'SCORING MODELS', 'WORKSPACE SETTINGS', and 'TOOLS'. The breadcrumb trail shows 'OVERVIEW', '1 FIT CATEGORIES', '2 ACTIVITY CATEGORIES', and '3 ADVANCED SETTINGS'. On the left, the 'FIT CATEGORIES' sidebar lists three categories: 50% (IS 6 MONTHS AFTER CONTRACT START DATE), 30% (LAST NPS SCORE), and 20% (# OF SUPPORT CASES). The 'CATEGORY DETAILS' for 'Last NPS Score' shows a weight of 30% and a mapping from 'Hubspot Connection' platform to 'Last NPS Score' field. A table below defines the score ranges: 0-6 maps to -25%, 7-8 maps to 75%, and 9-10 maps to 100%.

Determine which contacts are the best fit for your cross-selling pitch by assigning a weight to each fit category and, within a single category, giving a positive or negative value to increase or decrease the overall scoring for each category.

For example, let's imagine that one of your customers has had issues with your product or service that significantly impacted their experience. They've given you a low NPS score and have logged and escalated multiple support cases.

That's not an indicator that this is a great time for a cross-selling pitch because you need to focus on making them happy with what they've already purchased.

Instead, look for customers who have said they would recommend your business to others, who have engaged with your product briefs and support center, and who are already satisfied with your product or service.

# TRIGGER THE RIGHT ACTION AT THE RIGHT TIME BY MAPPING INTENT TO THE CUSTOMER JOURNEY

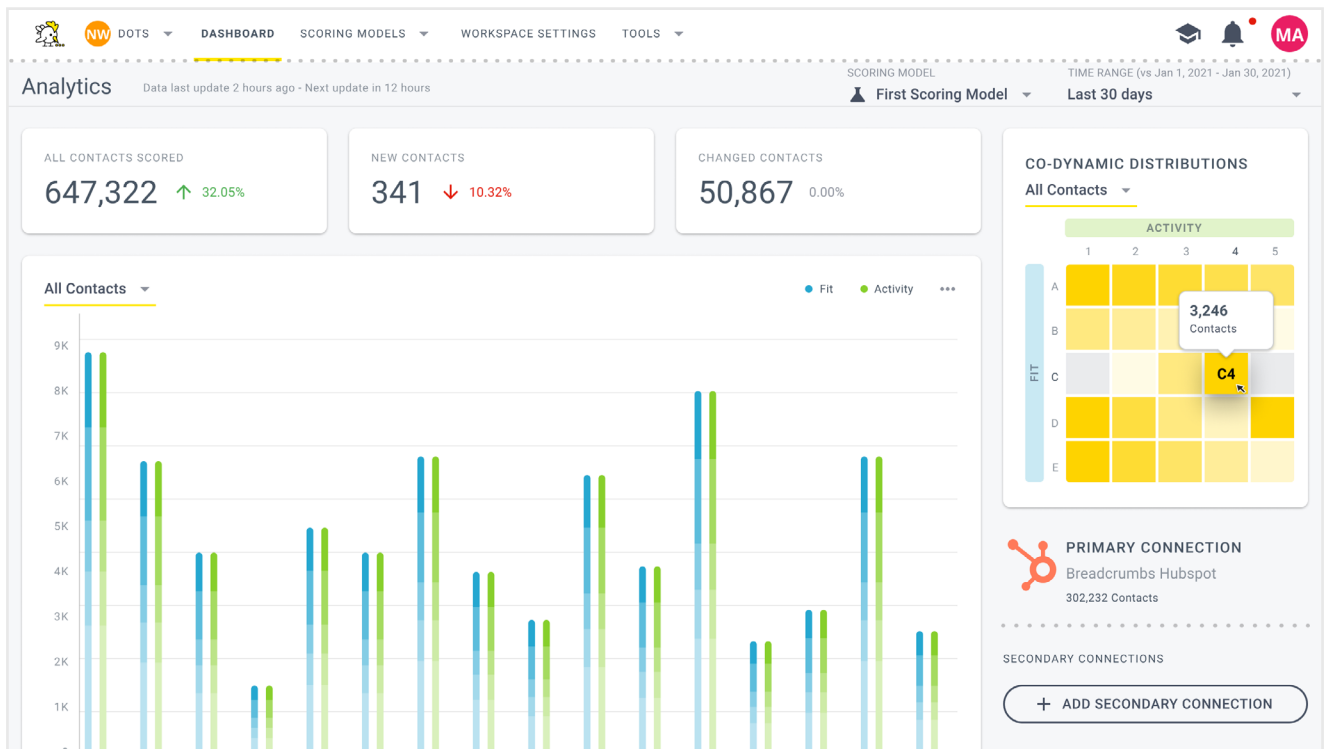
Once you have created your contact scoring models for upsell or cross-sell, it's now time to analyze the results and act on the signals that your customers are sending you right now.

When using Breadcrumbs, you'll immediately know which customers are worth reaching out to and which ones still need some gentle nudges to move to the next customer journey stage.

Let's see how Breadcrumbs works and how it can assist you in correctly ranking your customers to uncover upsell and cross-sell opportunities.

## HOW CONTACT SCORING WITH BREADCRUMBS WORKS

Breadcrumbs takes a co-dynamic approach to scoring. This means that your score will contain both a letter and a number, with 16 possible different variations, all with time decay factored into the equation (as over time, people become less likely to take an action and thus lowering their score).



Get the latest insights into your database, map intent to the customer journey, and trigger the right action at the right time immediately after activating your scoring model in Breadcrumbs

The letter represents fit, which determines how aligned the contact is with your buyer persona based on factors like their business size, industry, and needs. This is calculated by creating a usage vs. operational cost score.

Options include A, B, C, and D. A is the best fit, and D is the lowest.

The number will represent activity and engagement levels, which are based on factors like whether they've signed up for a trial, how responsive they are to emails, and how they're using the tool.

Your potential scores here include 1, 2, 3, 4, with 1 being the highest level of engagement and 4 being the lowest.

An A1 customer, for example, is as high intent as you can possibly get. They're a great fit for your business, and they're highly engaged. You want to act immediately.

You should never ignore D4 contacts, but the reality is that they may not be a good fit, and they're not as engaged. You don't want to put all of your eggs in one basket here.

## HOW TO PROPERLY RANK YOUR CUSTOMERS WITH CONTACT SCORING

Now that you know the difference between an A1 and a D4 customer, you're now probably wondering what you should do with a B2 customer.

The key factor here is that in order to see the most lift, you want to automate as much as possible of these actions.



**PRO-TIP:** Breadcrumbs will route back the scoring information to your CRM or marketing automation tool so that you can create automated workflows to respond to your customers' intent signals as soon as possible.

While you may need a score for each upsell/cross-sell opportunity, you can start by giving your team these insights:

- **A1 – A2** Immediately assign a rep to go after these customers. They are a great fit and are engaging right now.
- **B1 – B2** Offer in-product offers to upsell and cross-sell to these engaged customers with a medium fit score.

- **A3 – A4** These customers are a great fit but they're not ready for your Sales team. In order to re-engage them, consider running two automated campaigns about the products they should move to, and try to get them to an A1-A2.
- **B3 – B4** These customers are not engaging right now but they are medium fit so you still have an opportunity to get them to a B1-B2. Consider sending quarterly educational campaigns based on what product upsell/cross-sell they are moving towards.
- **C1 – D4** We recommend just trying to increase these through behavioral impacts and ads. They will auto-upgrade.

## KEY TAKEAWAYS

Upselling and cross-selling are strategies that you need to know if you want to sell more to your existing customers and get as much value from each client as possible.

This is where Contact Scoring comes into play.

Contact scoring can give you plenty of actionable and invaluable data that allows you to reach out to existing customers at the exact right time for an upsell or a cross-sell. This makes your marketing and sales teams work much more effective across the board.

In this guide, we shared the Contact scoring models we use to uncover upsell and cross-sell opportunities – but this is just part of the story.

That's because **you can use Contact Scoring at every stage of the customer journey** – as it applies not only to upsell and cross-sell but also acquisition (remember when it was called lead scoring?) and even churn detection.

It allows you to prioritize your leads and engage with current customers when they are most likely to buy, upsell or churn.

Identifying contacts that are ready to buy and retaining those at risk of churning just got way easier.

Welcome to the age of Revenue Acceleration.

Interested in leveraging contact scoring to increase upselling and cross-selling for your business? **SCHEDULE A DEMO WITH BREADCRUMBS NOW.**