SaaS Up-selling Checklist

Use this checklist as a guide to understand whether you are prepared to succeed at up-selling your SaaS product.

The Right Customer
- ☐ Customer is in the market segment that your product was designed for including enterprise vs SMB
- ☐ Customer is financially healthy
- ☐ For transaction/resource pricing - Customer has business growth to need more transactions/resources
- ☐ For additional feature pricing - Customer has requirement for the additional up-sell features
- ☐ For revenue sharing pricing - Customer's strategy and execution is likely to be successful

The Right Staff Skills
- ☐ Communication Skills
- ☐ Ability to acquire Customer Knowledge
- ☐ Product Knowledge
- ☐ Problem Solving Skills
- ☐ Account Planning skills, specifically the ability to turn the above into value-based opportunities

The Right Staff Motivation & Incentives (at least one of the below options is used)
- ☐ Measure customer success staff on customer satisfaction
- ☐ Measure customer success staff on customer satisfaction balanced with the level of up-selling achieved
- ☐ Use spiffs for customer success staff
- ☐ Use commission for customer success and/or sales staff
- ☐ Use commission and quota credit for customer success and/or sales staff

The Right Product Structure
- ☐ Pricing and customer value is aligned in a very direct way
- ☐ At least one or more paths for a customer to get added value once they have started using the offer

The Right Information
- ☐ Basic customer information -- product champion, purchaser, contact information & position information
- ☐ What was purchased - quantity of licenses, actual usage of the products, contractual terms & renewal date
- ☐ Good understanding of your customer's strategy and Key Performance Indicators (KPIs)
- ☐ Understand any negative views that your customer has about your product
- ☐ Account plans

The Right Tools
- ☐ CRM system
- ☐ Support ticket system
- ☐ Database of contracts & renewals
- ☐ Account planning software (optional)
- ☐ Customer success system (optional)

The Right Customer Attitude – Happy & Satisfied
- ☐ Good Net Promotor Score (NPS) results
- ☐ Good customer survey results
- ☐ No chronic or long-term unresolved problems