

Revenue Expansion Operating System

A cross-functional system that connected product opportunity, customer fit, ownership, execution, and measurable learning.

CROSS-SELL

REVENUE OPERATIONS

LEADERSHIP

The challenge

Expansion activity was happening, but it was difficult to compare opportunities, assign ownership, forecast impact, or learn consistently. Teams needed a shared operating rhythm, not another isolated campaign.

The design

Built a portfolio of expansion plays, a customer-prioritization model, clear roles, campaign channels, sales handoffs, KPI definitions, and a recurring decision cadence.

PRIORITIZE

Fit, value, effort

PILOT

Audience, offer, owner

MEASURE

Pipeline, adoption, retention

DECIDE

Keep, fix, stop, start

The scorecard

Combined leading and lagging indicators, including audience readiness, outreach, qualified conversations, pipeline value, activation, retention signals, and operational friction.

What it enabled

A practical rhythm for choosing the right opportunities, running focused pilots, surfacing blockers early, and reallocating effort based on evidence rather than volume of activity.