
CROSS-SELL POTENTIAL

QUESTIONNAIRE

EVALUATING HOW WELL YOUR COMPANY IS DOING AT CROSS-SELLING

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CROSS-SELL POTENTIAL QUESTIONNAIRE

DIRECTIONS:

Grade yourself and your team 1-5. Using the blank lines, brainstorm what you can do to improve your score. Then, add up your score and see where your total falls.

Here are two blog posts to get you thinking about your cross-sell potential:

- [The most overlooked goal and metric for maximizing revenue growth](#)
- [How to get more business from your client-base](#)

1

2

3

4

5

WE NEED TO WORK ON THIS

WE DO AN EXCEPTIONAL JOB AT THIS

YOUR ANSWER

We have a process to mitigate our new client's buyers remorse and make the first 100 days exceptional.

We have a process to proactively resolve issues and help our client's deal with challenges in their changing business with additional products and services.

We have a sales perspective baked in to our client management process.

CROSS-SELL POTENTIAL QUESTIONNAIRE

1

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YOUR ANSWER

WE NEED TO WORK ON THIS

WE DO AN EXCEPTIONAL JOB AT THIS

We have a process to report back on KPIs/Success metrics that we deliver to our clients.

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We have a process to deliver enhanced services to the clients that we serve that are "Ideal Clients."

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We have events that allow our clients to interact with one another and learn about additional outcomes that they might realize from our services.

—

We have implemented a process to get referrals from our happy clients.

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CROSS-SELL POTENTIAL QUESTIONNAIRE

TOTAL

DIRECTIONS:

Add up your scores from the questionnaire. Total possible score is 35.



Score 0-11

Your cross-selling processes needs some help. The good news is that there is a *big opportunity* to earn more share of wallet from your current clients. Start by ensuring you are delighting your customers, so you can earn the right to cross-sell.



Score 12-23

You're doing okay at cross-selling, but your processes could use some improvement. There may be a few opportunities to delight (and then upsell) your clients that you are missing out on.



Score 24-35

You are doing great! You have documented processes for how you delight your clients, communicate your value to them and all of your teams are aligned on how to cross-sell them. Regular check-ins will help you stay on top of any changes in your or your clients' businesses.

Notes
