

PLAY #23:

CUSTOMER EXPANSION CAMPAIGN

Proactive | Expansion | CS + Marketing sync

This play focuses on the revenue already within reach: customers who are ready for more. Whether it’s a natural cross-sell into an adjacent product or an upsell to a premium tier, expansion campaigns help you unlock growth inside the logos you’ve already won.

It starts by identifying accounts that meet a specific eligibility profile, whether based on product usage, lifecycle stage, or success milestones. From there, CS and Marketing coordinate a tailored campaign that positions the next best step, not just the next product.

Think of it as ABM for your existing customers: focused, timely, and deeply personalized based on what they’ve already achieved (and what they stand to gain).

What it looks like in action

Tactic	Description
Identify eligible accounts	Use CS tools like Gainsight, Catalyst, or Vityally to surface accounts hitting milestones. AI can detect usage spikes, feature adoption, or renewal-stage engagement.
Launch feature-specific campaign	Launch a short-form campaign (ads, emails, landing page) tied to an underused feature or a new product. Frame it in terms of their goals, not yours.
Share adjacent use case stories	Share examples from peers who successfully expanded: “After adopting X, they rolled out Y and cut time-to-value by 40%.” AI can match stories to ICP traits.
Enable AE / CSM outreach	Equip reps with account-specific decks, talk tracks, and CTAs. Tofu can auto-generate tailored assets using product usage and CRM context.
Trigger milestone education tracks	Enroll accounts in a light email series when they hit maturity milestones. Focus on value unlocked, not features missed.
Use nurture-to-meeting CTAs	Use “Ready for what’s next?” CTAs that guide accounts toward a discovery call, pilot, or tailored workshop. Time outreach around renewal windows or product usage bursts.

WHY IT WORKS:

Customer expansion plays land because they're high-context and low-friction. You're not pitching something unfamiliar; you're pointing out what's next.

When you align product readiness with precise messaging, you show up with solutions that feel timely and obvious.