PLAY #26:
QBR-INFORMED EXPANSION PLAY

Proactive | Expansion | Insight → Action

Your best expansion lever might already be in your slide deck. QBRs and EBRs are rich with insight: usage milestones, upcoming priorities, pain points, goals. But too often, those insights stay in that deck. This play turns them into action.

After a QBR, your team identifies a clear opportunity for growth—adding a module, upgrading tiers, expanding seats, or piloting a new workflow—and runs a tight follow-up campaign that ties directly to what was discussed. It's not a generic upsell, but a tailored next step, aligned with their own words.

What it looks like in action

Tactic	Description
Extract signals from QBRs	Use AI tools like Gong, Grain, or Fireflies to pull themes from recorded QBRs: upcoming rollouts, blockers, or stretch goals.
Sync CS + Sales with a signal brief	Turn QBR takeaways into a 1-pager: what they said, what's changing, and where your solution fits. Align timing and outreach across teams.
Auto-generate a ready-to-run content kit	Use Tofu to spin up a tailored deck, one-pager, and email sequence based on customer goals—so reps can follow up fast, without starting from scratch.
Trigger a 3-touch follow-up flow	Send a tight email series 3–5 days post-QBR. Echo the customer's priorities in their own words, and show what the next step looks like.
Invite them to test-drive the next step	Offer a no-risk pilot or hands-on preview tied to a current goal. Position it as a low-lift way to accelerate progress this quarter.
Tie expansion to long-term value	If renewal's on the horizon, bundle the expansion into the contract convo. Make it about future-proofing results, not just increasing spend.

WHY IT WORKS:

Customers tell you what they need—sometimes explicitly, and sometimes between the lines. This play closes the loop: capturing insight in the QBR, then activating it while it's fresh.

Because the message is directly tied to their own plans, it feels less like a pitch and more like help moving forward.