

Business Growth Optimization

Advanced Up-Selling and Cross-Selling Techniques

Presented by :

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 GRAPHUS

 ID AGENT

 UNITRENDS MSP

 RapidFireTools

 ERICKSIMPSON
.COM

Forecasting Client Lifetime Value - CLV

- Who are they – “A”, “B”, “C” clients?
- What do they buy?
- When do they buy? Monthly, quarterly, yearly?
- What do they spend Year over Year?
- What are their budget cycles?





Landing and Expanding

- Who are all of the stakeholders?
- Who are the other business units?
- Who are the other locations?
- Who are the other vendors?

Finding the Budgets

- What are the initiatives?
- Are initiatives global, regional, local?
- Are initiatives company-wide, across multiple business units or smaller?
- What are the timelines?
- Where can we find budget?



Funding



Business



Growth



Partnering with your Sales Engineer

- What is your sales engineer's role?
- When do you bring in a sales engineer?
- How do you position your sales engineer's value?
- How do you calculate sales engineer ROI?

Leveraging your vCIO

- Are you delivering accidental or intentional vCIO/vCTO services?
- Are you driving initiatives?
- How broad is your focus?
- Do you help direct budgets?



Multi-Phasing Projects Longer-Term

- Are you helping your clients get to “YES”?
- How do you phase projects today?
- How can you phase larger value projects differently over time to influence client growth and transformation?



Advanced Bundling

- Do you bundle services beyond traditional MSP or Cybersecurity offerings?
- What would a VoIP bundle look like? (Voice, Data, Videoconferencing)
- What would a WFH/WFA bundle look like? (Connectivity, Security, Collaboration)





Teaming and Partnering

- Do you deliver each and every service your clients need to advance their business growth?
- Do you team or partner with other affinity or complementary vendors or providers today?

Technology Roadmapping

- Are you conducting forward-looking strategic roadmapping sessions or reactive service reviews?
- Are your roadmaps longer than your agreement terms?
- Are you properly positioning the value of these sessions?
- Are you conducting budget conversations and securing budget approvals?

1 First Year Projections						Est.
	Document	Qty	Cost	Total	Date Due	Hours
1.1 Disaster Preparedness						
1.1.1	Disaster Recovery Plan		\$0.00	\$0.00		
1.2.1	Disaster Recovery Testing		\$0.00	\$0.00		
1.3.1	Business Continuity Planning		\$0.00	\$0.00		
			\$0.00	\$0.00		
1.2 Servers						
1.2.1	Physical Servers (Hardware Management)		\$0.00	\$0.00		
1.2.2	Physical Servers which are Hypervisors (Hypervisor Management)		\$0.00	\$0.00		
1.2.3	Active Directory/Domain Controllers (Physical or Virtual OS Mgt)		\$0.00	\$0.00		
1.2.4	File/Print/Application Servers (Physical or Virtual OS/App Mgt)		\$0.00	\$0.00		
1.2.5	Database Servers - SQL or MYSQL (Physical or Virtual OS/App Mgt)		\$0.00	\$0.00		
1.2.6	Microsoft Exchange (Physical or Virtual OS/App Mgt)		\$0.00	\$0.00		
1.2.7	Terminal Servers (Physical or Virtual OS/App Mgt)		\$0.00	\$0.00		
1.2.8	Web Servers (Physical or Virtual OS/App Mgt)		\$0.00	\$0.00		
1.3 Desktops/Laptops/Tablets/Smartphones						
1.3.1	Workstations		\$0.00	\$0.00		
1.3.2	Thin Clients		\$0.00	\$0.00		
1.3.3	Notebooks		\$0.00	\$0.00		
1.3.4	Tablets		\$0.00	\$0.00		
1.3.5	Smartphones		\$0.00	\$0.00		
1.3.6	Hardware Asset Management		\$0.00	\$0.00		
			\$0.00	\$0.00		
1.4 Printers						
1.4.1	Laser Printers		\$0.00	\$0.00		
1.4.2	InkJet Printers		\$0.00	\$0.00		
1.4.3	Specialty Printers		\$0.00	\$0.00		
1.4.4	Fax Machines		\$0.00	\$0.00		
1.4.5	Printer Supplies		\$0.00	\$0.00		
1.4.6	Fax Supplies		\$0.00	\$0.00		
1.4.7	Paper		\$0.00	\$0.00		
			\$0.00	\$0.00		
1.5 Software						
1.5.1	Operating Systems - Microsoft® Windows® Server 2016		\$0.00	\$0.00		
1.5.2	Operating Systems - Microsoft® Windows® 10 Professional		\$0.00	\$0.00		
1.5.3	Productivity Software - Microsoft® Office 2016 Professional		\$0.00	\$0.00		
1.5.4	Microsoft® Software Assurance		\$0.00	\$0.00		
1.5.5	Other Software Maintenance		\$0.00	\$0.00		
1.5.6	Software Asset Management		\$0.00	\$0.00		
			\$0.00	\$0.00		