

AUTOMATE

Intermediate

25 MIN

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Mine post-sale data for cross-sell opportunities.

Examine customer usage data after purchase to flag accounts showing signals for an expansion or cross-sell conversation.

MICROSOFT 365

Excel

WORKS WITH

Claude

Copilot

Business Outcome

Expansion revenue captured from existing customers before a competitor notices the same opportunity.

Workflow Steps

Step 1: Define what a cross-sell signal actually looks like

Excel

Look back at your last several successful expansions and write down the usage pattern that preceded each one as a specific, numeric rule.

Hitting a usage cap 3+ times in a month, 90%+ seat utilization, adoption of a feature that commonly pairs with an add-on — rather than a vague sense of "accounts that seem engaged."

Step 2: Analyze the usage export

Copilot

Claude

Load the usage data into Excel and ask Copilot to surface accounts matching those defined signals, rather than a generic "who looks like they might buy more."

PROMPT

Using this usage export, flag any account that has hit their usage cap 3+ times in the past month or has more than 90% seat utilization. For each, state which signal triggered the flag and the specific numbers behind it.

Step 3: Prioritize by signal strength and account value

Excel

Rank the flagged accounts by how strong the signal is and the account's existing contract value, so the account team works the highest-value, clearest opportunities first.

Step 4: Hand the list to account owners with the evidence attached

Excel

Give each account owner the specific usage data behind the flag, not just a name on a list — that's what lets them have a grounded conversation instead of a generic upsell pitch.

✓ Check the work

- Verify the usage numbers behind a sample of flagged accounts against the source export directly.
- Confirm the account isn't already in a churn-risk or support-escalation state — a cross-sell pitch to a frustrated customer backfires.
- Check that flagged signals reflect recent, sustained usage, not a one-time spike.

Expected Outcome

A ranked list of accounts showing cross-sell signals, with the specific usage pattern behind each flag.



Want help rolling this out across your team? **Go to Liminals.Tech** ■