

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Finding customer expansion signals without confusing activity with value

QUESTION

Which customer changes justify exploring an additional use case or buying unit?

GUIDE TAKEAWAY

High product use can indicate value, operational dependence, or frustration. A new department may be interested while the existing deployment remains unhealthy.

START HERE

Observe customer change.

YOUR SITUATION

Account or cohort

Decision to make

Starting state and exclusions

Evidence sources, dates, and limitations

Unknowns to validate

WORK THROUGH THE GUIDE

1. Observe customer change

Evidence or input

Output or decision

Owner and review point

2. Check current value

Evidence or input

Output or decision

Owner and review point

3. Form expansion hypothesis

Evidence or input**Output or decision****Owner and review point**

4. Validate with customer success

Evidence or input**Output or decision****Owner and review point**

5. Confirm new buying need

Evidence or input**Output or decision****Owner and review point****COMPARE THE OPTIONS**

Usage growth

Useful when: Exploring broader adoption

Limitation: Growth may be seasonal or inefficient

Suggested action: Confirm delivered outcome

Why this fits our situation**Evidence needed before acting**

New-team interest

Useful when: Finding an additional use case

Limitation: Buying entity and mandate may differ

Suggested action: Map new stakeholders

Why this fits our situation**Evidence needed before acting**

Capacity pressure

Useful when: Testing commercial scope

Limitation: Limits may reflect poor configuration

Suggested action: Check operational cause

Why this fits our situation

Evidence needed before acting

Sponsor introduction

Useful when: Opening a contextual conversation

Limitation: Goodwill does not establish budget

Suggested action: Agree discovery purpose

Why this fits our situation

Evidence needed before acting

COMMIT TO A BOUNDED NEXT STEP

Chosen action

Responsible owner

Required approval

Success measure and definition

Review date

Continue, revise, or stop criteria

Guide: <https://outsell.com/blogs/customer-expansion-signals/>

Publisher and evidence policy: <https://outsell.com/editorial-policy/>