

Upselling & Cross-Selling — Workbook

This workbook turns the course into a working expansion program for your own business. You will size your real opportunity with attach rate and AOV, run an affinity analysis on your own orders, map offers to journey moments, and design good-better-best pricing and bundles you can launch this month. Work through one section per module, fill the worksheets with your actual numbers, and use the templates as live tools rather than examples. Keep the standard from the course front of mind: the best expansion offer is one the customer would thank you for.

The Economics of Selling More to Existing Customers

Establish your expansion baseline with honest attach rate, AOV, expansion revenue and NRR numbers before changing anything.

Worksheet: Your Expansion Baseline

Pull the figures from your store, billing system or CRM for the last full month and complete each line. Use gross margin, not revenue, wherever a profitability line appears so your numbers are defensible to finance.
Number of orders last month

Total revenue last month

Average order value (revenue / orders)

Top add-on product name

Units of that add-on sold

Units of the matching primary product sold

Attach rate for that add-on (add-on units / primary units)

Monthly recurring revenue at start of period (if subscription)

Expansion revenue this period (upgrades + add-ons + usage)

Contraction + churn this period

Net revenue retention ((start + expansion - contraction - churn) / start)

Gross margin %

Exercise: Classify Your Current Offers

List every place you currently ask a customer to spend more, then label each one as an upsell, cross-sell, order bump or downsell and judge whether the move fits the moment. Be honest about offers that are really just clutter.

- Which of your current asks are upsells versus cross-sells, and have you been confusing the two?
- Where are you firing offers at the wrong moment, such as a premium upsell during onboarding?
- Which single offer would you keep if you could only keep one, and why?
- Where do you currently have no offer at all, leaving obvious expansion revenue on the table?

Checklist: Measurement Readiness Checklist

- I can pull per-order line items to compute attach rate for any add-on
- I am tracking AOV and can segment it by customer type
- I have separated expansion revenue from new-customer revenue
- I am using gross margin, not revenue, in profitability lines
- I have identified the one or two metrics (AOV, attach rate, NRR) that fit my model
- I have a holdout group or plan to measure incremental lift, not just take rate

Finding the Right Offer for the Right Customer

Discover what genuinely pairs in your catalog and decide which customers are ready for which offer.

Exercise: Run Your First Affinity Analysis

Export your orders with order ID and product names. Pick your three best-selling primary products. For each, count how often a candidate add-on appears in the same order, then calculate support, confidence and lift using the formulas from the course. Use the Affinity Analysis Tracker template to do the math.

- Which pairing has the highest lift, and is it one you are already promoting?
- Did any high-margin product you assumed would cross-sell actually show a lift below one?
- Which pairing surprised you, and what does it tell you about how customers really use your products?
- What are the three highest-lift pairings you will turn into automatic recommendations this week?

Worksheet: RFM Segment-to-Offer Map

Score a sample of customers 1 to 5 on recency, frequency and monetary value, then assign each combined cell the appropriate expansion move. Fill the map so every segment has a deliberate offer or an explicit do-not-pitch.

Champions (5-5-5): best expansion offer for them

Loyal high-spenders (4-5-5 to 5-4-5): best offer

Promising newcomers (5-1-1 to 5-2-2): best low-risk offer

Steady mid-value (3-3-3): best offer

At-risk previously valuable (1-4-5): action before any offer

Recently churned (1-1-x): explicit suppression rule

Health-score threshold below which I will NOT upsell

Tool I will use to build and maintain these segments

Checklist: Recommendation Ethics Gate

- Every recommended add-on has a lift above one in my own data
- I would personally recommend the add-on to a friend buying the main product
- No add-on is pre-ticked or hidden at checkout
- I never surface a pricier item that performs worse purely for margin
- I suppress expansion offers to at-risk and recently-churned customers
- I have reviewed my top ten recommendations against the would-they-thank-me test

Timing and Placement Across the Customer Journey

Map each expansion move to the precise journey moment where it helps rather than annoys.

Worksheet: Journey Moment Offer Plan

For each moment in your customer journey, decide the single best expansion move, the specific offer, and the trigger that fires it. Leave a moment blank only if no relevant offer exists; never crowd a moment with multiple competing asks.

Product page: move + offer

Cart / checkout: order bump + cross-sell

Post-purchase thank-you page: one-click upsell offer

Onboarding: value-accelerating cross-sell only

Usage / value milestone: upgrade trigger and threshold

Renewal (60-90 days out): expansion offer and value-review angle

Support resolution: relevant cross-sell (e.g. service plan)

Moments I will deliberately leave offer-free

Exercise: Design One Post-Purchase Upsell Funnel

Choose your best post-purchase offer and script the full one-click sequence: the upsell, the reason it helps, the optional first-time discount, and the downsell if declined. Map what the customer sees at each step.

- What single logical next item will you offer immediately after purchase, and why is it the obvious one?
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- What is the one-line reason that makes the offer feel like help, not a toll?

- What downsell will you present if the customer declines, so you keep some incremental value?

- Which guardrail metrics (refund rate, chargebacks) will you watch to confirm the funnel is healthy?

Checklist: Timing and Friction Checklist

- Each offer fires at the moment the customer feels the win or the ceiling, not before
- Checkout carries at most one or two low-friction bumps
- Post-purchase upsells use one-click with no re-entry of payment details
- Pre-purchase upsells do not depress my core conversion rate (verified against a holdout)
- No single journey moment is crowded with competing offers
- Subscription upsells fire on real usage signals, never on unhealthy accounts

Pricing, Bundling and Continuous Improvement

Engineer honest good-better-best pricing and bundles, then build the testing rhythm that keeps expansion compounding.

Worksheet: Good-Better-Best Tier Designer

Design three tiers so the middle is the intended winner and the top anchors it as sensible. Fill each line, then sanity-check that every option is genuinely fair at its price.

Tier 1 (Good): name, price, who it is for

Tier 2 (Better): name, price, the features that make it the default winner

Tier 3 (Best): name, price, the power-user features that anchor the middle

The anchor I lead with (highest tier or premium bundle)

Is any tier a fake decoy no one could rationally buy? (must be no)

Percentage of customers I expect to choose the middle tier

Honest-comparison check: would a customer feel respected seeing how this menu was built?

Exercise: Build and Price One Bundle

Pick three genuinely complementary products and build a mixed bundle using the Bundle Pricing Calculator template. Set a price that shows a real saving while preserving healthy margin, and confirm the items truly belong together.

- What single question does this bundle answer for the customer (what else do I need to make this work)?

- What is the displayed saving versus buying the parts separately, and is it obvious enough to drive a yes?

- What blended margin do you retain at the bundle price, and is it sustainable?

- Are you bundling because the items belong together, or just to clear dead stock? (be honest)

Worksheet: Expansion Experiment Card

Before launching any offer, complete this card so the test is clean and the result is defensible. One variable, one primary metric, a holdout, and a pre-set stopping rule.

Hypothesis (this offer, to this segment, at this moment, will...)

Single variable being changed

Primary metric (e.g. incremental revenue per visitor)

Guardrail metrics (refund rate, conversion, satisfaction)

Holdout group definition

Required sample size or run duration before deciding

Decision rule and who signs off

Result and rollout decision (filled after the test)

Checklist: Monthly Expansion Operating Rhythm

- Reviewed attach rate, AOV and NRR against target
- Checked guardrail metrics: refunds, chargebacks, conversion, complaints
- Retired offers that underperformed the holdout
- Launched one or two new experiments with completed experiment cards
- Refreshed recommendation rules with the latest affinity (lift) data
- Confirmed no expansion offers are reaching at-risk or unhealthy accounts

Your Action Plan

1. Compute your baseline: orders, AOV, attach rate for your top add-on, and NRR if you run subscriptions.
2. Export your orders and run an affinity analysis on your three best sellers; rank pairings by lift.
3. Turn the three highest-lift pairings into automatic recommendations at the cart or product page.
4. Build RFM segments and map each cell to a deliberate offer, with explicit suppression for at-risk customers.
5. Map every journey moment to one expansion move and remove offers that fire at the wrong time.
6. Launch one one-click post-purchase upsell funnel with a downsell, and instrument refund and chargeback rates.
7. Redesign your pricing into honest good-better-best tiers with the middle engineered to win.
8. Create one mixed bundle that shows a real saving while preserving healthy margin.
9. Set up an A/B test with a holdout for your single most promising offer using a proper testing tool.
10. Adopt the monthly operating rhythm: review metrics, check guardrails, retire losers, launch new tests.

