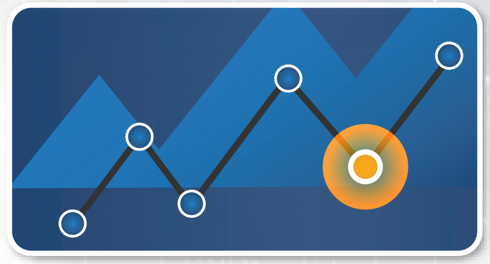
Success Metrics
Upselling Template



Success metrics and milestones are a useful way to track the progress of your existing prospects' efforts to achieve their business goals.

When used effectively, they can strengthen the business-partner relationship and will indicate the right time to reach out with additional solutions and offerings, helping to drive your customer's business growth.

How to use this template: In the below table, fill in the left column with goals that your customer would like to achieve for their organization. Some examples may be reducing the time it takes to process invoices, reducing the costs of document storage, or reducing the number of labor hours annually. In the baseline column, enter the initial value as it exists before a solution is implemented. Help your customer calculate the new value for each target goal on a quarterly basis, and fill in the value in its respective quarterly column. Track the changes as they occur, and review which goals are being accomplished.

Keeping track of customers' progress toward meeting certain goals allows your organization to:

- **Spot opportunities** to make offerings which will fill an apparent gap in their current plan.
- **Build your referenceable customer list** by converting achieved metrics into reusable quotes and case studies.
- **Solidify your role as a business partner**. If they're already finding success through a solution you helped implement, additional expertise will likely be welcome.

Customer Name:

Ownership Legend:
Indicate which roles in the prospect's organization serve as decision makers for each metric.

1	2	3	4	5	6	7	8

Success Metrics	Baseline	Q1	Q2	Q3	Q4

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