



Success Story: Cross-Sell Transformation Drives Revenue Growth

Going from zero to 25% cross-sell conversion rates through strategic customer expansion.



Executive Summary

A leading portfolio intelligence platform provider transformed its cross-sell motion in under five months, achieving a **25% conversion rate**, boosting demo readiness by **36%**, and building a **repeatable customer expansion framework**. **MINGO MEDIA** designed and executed a six-week collaborative sprint with enablement support, culminating in an expansion strategy, playbook, workshop, and reinforcement resources.

The Challenge: Maximizing Untapped Revenue Potential

This Boston-based fintech trailblazer, recognized as the industry-leading portfolio intelligence and reporting platform, has built strong relationships with its hedge funds and asset management firm customers. With the addition of valuable new modules, the company recognized a significant opportunity to drive additional revenue from its existing client base.

The Client Solutions team had deep client rapport and strong product knowledge, yet lacked a systematic approach to:



Identify cross-sell opportunities across investment teams



Confidently lead demos on sophisticated modules



Handle objections tied to pricing, timing, and value

The situation was clear: To transform its ad-hoc expansion efforts into a repeatable, scalable process that would maximize revenue while strengthening client relationships, the company required more than just a sales push. They needed a mindset shift.

The Solution: A Targeted Customer Expansion

MINGO MEDIA designed and delivered a Customer Expansion Workshop customized for the organization's unique client base and product complexity.

Strategic Workshop Design

- **Opportunity Targeting Framework:** Taught the team how to uncover new investment teams within firms and spot high-potential upsell paths.
- **Conversation Architecture:** Collaboratively developed tailored messaging focused on business outcomes, not technical features.
- **Objection Handling Repository:** Role-play exercises produced a team-wide library of rebuttals for common objections.
- **Demo Confidence Building:** Provided tools for delivering high-impact demos aligned with client-specific priorities.

Implementation & Reinforcement

- **Customer Expansion Playbook:** Custom 26-page guide with call scripts, objection examples, best practices, team activities, and QR codes to repositories.
- **Salesforce Integration:** Defined how to track expansion efforts with custom fields and tags.
- **Knowledge Sharing Practice:** Weekly meetings were restructured to include peer learning.
- **Success Story Repository:** Institutionalized internal wins as reusable assets.

The Following Quarter Results at a Glance

82% of clients contacted engaged
in a follow-up meeting or demo

25% cross-sell wins
of those follow-up meetings and demos

15% more are in active trials
of the new modules

36% boost
in new demo delivery confidence

86% of the team
is "demo-ready," freeing up managers and subject matter experts

Client Voices on Confidence and Culture Shifted

The enablement program yielded more than tactical results. It built a self-sufficient, high-performing team. Team members now view expansion as a service, not a sales tactic.

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Changing my mindset about upselling... I'm doing clients a disservice if I don't offer these modules.

- Client Success Manager, Fintech Company

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I will certainly think about the frameworks for building responses, and I'm excited to leverage the success stories and playbook.

- Client Success Manager, Fintech Company

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Junior members of the team have become more self-sufficient with the cross-sell demos. We've made good progress.

*- Senior Managing Director
of Client Solutions, Fintech Company*

Strategic Impact

This initiative created a repeatable, scalable process for cross-sell success:

- A team-wide playbook of proven discovery questions, value props, and demos
- Culture of peer-to-peer learning and proactive engagement
- Clear Salesforce visibility into expansion motions

This financial technology leader's transformation demonstrates the impact of focused enablement. Equipping client-facing teams with the right frameworks and support makes customer expansion achievable and repeatable.

Ready to unlock your own expansion potential? MINGO MEDIA's enablement programs can help you accelerate growth quickly. Let's talk: 917.225.1068 or to find out more, visit mingomedia.com