

Expansion Playbook

INTERNAL — Helix Engineering / CS Operations

OVERVIEW

Net revenue retention is driven by expansion within existing accounts. Most healthy customers will expand if asked at the right moment about the right opportunity.

EXPANSION VECTORS

(1) Seat expansion — more users on existing plan. (2) Plan upgrade — Pro to Enterprise. (3) Add-ons — premium support, dedicated environment, additional integrations. (4) Multi-product — cross-sell into other Helix products.

SIGNALS THAT EXPANSION IS APPROPRIATE

Customer is approaching plan limits. New teams within the customer organization are inquiring about Helix. Customer mentions wanting features available only on a higher plan. Customer's own business is growing (raised funding, hiring, new offices).

TIMING

Best windows: shortly after a successful QBR; after a major win the customer attributes to Helix; during contract renewal discussions; after a successful incident handling that built trust.

BAD TIMES TO PROPOSE EXPANSION

Right after a major incident or extended outage. During contract dispute. When the customer has just downgraded. When the champion has just left.

DISCOVERY APPROACH

Don't pitch product. Ask about goals. 'What would help your team get more value from Helix?' is better than 'Have you considered upgrading to Enterprise?'

PROPOSAL FRAMING

Frame expansion as a natural progression of value, not a sales pitch. Show usage data. Quantify the upgrade in business terms (saved hours, reduced errors, faster turnaround).

WHEN TO LOOP IN ACCOUNT EXECUTIVE

For seat expansions and add-ons, CSM closes solo. For plan upgrades and multi-product, the AE leads. CSM remains involved as the trusted advisor.