

ACCOUNT MANAGEMENT + CUSTOMER SUCCESS

Your Expansion Plan Is Not the Customer's Shopping List

Separate customer evidence from seller ambition. Then choose the next conversation.

For SaaS account managers, customer success leaders and sales leaders responsible for existing customers

Your target is not their priority

Treat “sell the reporting module” as your team’s ambition until the customer gives you a reason to treat it as their priority. A space on your account plan is not a buying signal. Our recommendation: before assigning the next upsell task, ask which part of the proposed opportunity the customer has actually confirmed.

Keep the answer specific. “They are a big account” describes the customer. “They have budget” describes a possible resource. Neither tells you which problem they want to solve next. Write that problem down, along with who described it and what remains unknown. If you cannot, your next task is a conversation, not a proposal.

Use the research without overselling it

GitLab’s account-planning guidance recommends asking how the customer views GitLab, how long the relationship has lasted, what the customer spends, which DevOps stages they use GitLab for, and where expansion opportunities have been identified. This is GitLab’s practitioner guidance. Its publication date is unknown in the research record; it is not a benchmark or evidence that these questions increase retention or revenue. [1]

Our proposed application is narrower than a retention strategy: use an account profile to decide what you need to learn before pursuing expansion. Separate confirmed customer information from your interpretation. A colleague’s suggestion belongs in the plan, but label it as a suggestion until the customer has responded.



THE WORKED EXAMPLE

A useful answer can be “fix this first”

Consider a fictional project-management software account. The account manager wants to pitch advanced reporting. The team knows the customer uses task boards. A recent support conversation says project owners struggle to keep those boards current. Nobody has asked whether better reports are the customer's priority. The expansion idea is therefore an assumption, not a confirmed request.

In this fictional case, the account manager and customer success manager prepare a different question: “Are you trying to get better reports, or make the underlying project updates reliable?” The customer says unreliable updates are the immediate problem. More sophisticated reports would still be built on information the team does not trust.

The completed decision in this fictional example is to pause the reporting pitch. Customer success agrees to examine the update problem with the customer's project lead; the account manager records what would justify revisiting reporting. No extra sale is claimed. The exercise has produced a named next action and a reason for it, instead of another unsupported sales task.

Do not turn this into another approval maze

If the customer has already requested the additional capability and explained the problem it should solve, do not make them repeat a discovery exercise for your paperwork. Confirm the scope and proceed with the appropriate commercial conversation. The check is useful where your team's assumptions are doing the work that customer input should do.

Nor should every expansion idea trigger a company-wide meeting. Involve the colleague who can resolve the uncertainty. That might be customer success for a usage problem or a technical specialist for a capability question. Give that person a question to answer, not a vague invitation to “align on the account”.

Leave the review with a decision

Use the worksheet below on a live expansion idea. Finish with a choice: pursue the conversation, investigate a missing fact, or address the existing problem first. Record the customer question, the person who will ask it and what answer would change your next move. If the review produces only a longer account plan, you have not finished.

Turn an idea into a next move

Choose one existing-customer expansion idea. Complete this before assigning another sales task. The examples below are fictional.

1. The proposed expansion

Name the additional product, use case or team you hope to sell to. Write “our proposal” unless the customer has requested it. Example: advanced reporting; our proposal.

2. What the customer has confirmed

Record the relevant customer statement or observed use, where it came from and when. Separate it from your interpretation. Example: task boards are in use; a support conversation raised unreliable updates.

3. The assumption to test

Write the missing fact as a question. Example: does the customer need better reporting, or more reliable project updates? Mark it unknown until answered.

4. The next conversation

Name who will ask that question and the customer contact who can answer it. Involve a colleague only when they can help resolve the uncertainty.

5. The decision and what would change it

Choose: pursue, investigate, or address the existing problem first. Complete: “We will ____ because _____. We will revisit this when ____.” In the fictional case: pause reporting and investigate updates; revisit if the customer confirms reporting remains a priority.

Source and limits

[1] GitLab, Account Planning. Publication date unknown. Attributed practitioner guidance (evidence level C), not a benchmark or evidence of revenue or retention uplift. The example and worksheet are GTMA proposals. Company applicability was not individually verified in the legacy source review.

[Read the original guidance](#) | [GitLab handbook: CC BY-SA 4.0](#). Paraphrased with original GTMA commentary.