Expansion
Deal Diagnostic

What's Going Wrong (and What to Do About It)

Stalled expansion deal? Before you chase discounts or beg for "one more meeting," use this diagnostic to pinpoint where the conversation is breaking down—and how to jumpstart it back to life.

Symptom:

"We never defined what success means, and now they're not seeing it."

Possible breakdown: Vague or misaligned expectations

Check: Define Success Metrics

Your move: It's not too late. Revisit your customer's strategic goals, co-define outcomes that link to leadership priorities, and start tracking progress against them.

Symptom:

"They're quiet after implementation."

Possible breakdown: Low adoption or internal pushback

Check: Accelerate Change and Adoption

Your move: Deliver a Why Change message to the new stakeholders—highlight Unconsidered Needs and contrast the old way with the new.

Symptom:

"We're dealing with conflicting agendas internally."

Possible breakdown: Misaligned stakeholders

Check: Manage Competing Interests

Your move: Map the players. Reframe the conversation so each stakeholder sees how their win ties to the broader business outcome.

Symptom:

"They seem satisfied, but we haven't talked strategy in months."

Possible breakdown: Lost executive alignment

Check: Demonstrate Promised Value

Your move: Elevate your next QBR. Go beyond usage metrics and tie outcomes back to their board-level goals. Reconnect the dots to your original value promise.

Symptom:

"They're considering competitors—even though they said they're happy."

Possible breakdown: You've become invisible

Check: Reinforce Partnership Value

Your move: Don't disrupt the status quo—you are the status quo. Use a Why Stay message to reaffirm the progress you've made and highlight the risks of switching from your solution.

Symptom:

"They haven't mentioned new opportunities and they're not asking about more."

Possible breakdown: Static, transactional relationship

Check: Identify New Opportunities

Your move: Share a trend, insight, or competitive shift that highlights the need to evolve their current approach and opens the door to the next conversation.

Symptom:

"They brought up concerns we thought were already solved."

Possible breakdown: Service issue perception or trust erosion

Check: Resolve Concerns Responsively

Your move: Use a Why Forgive message—own the issue, show resolution steps, and re-state your shared goals to restore confidence.

Symptom:

"They don't seem to remember what we've done."

Possible breakdown: Forgettable messaging

Check: Deliver Compelling Communications

Your move: Sharpen your 10% message. Use repetition and visuals to make your value story stick—especially in QBRs, renewal pitches, and expansion conversations.

Want More Tactical Moves Like These?

Grab our e-book, The Great 8 for Expansion, to learn the essential competencies your team needs to reduce churn and grow existing accounts—backed by real buyer data from over 120,000+ won and lost deals.

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