Strategic Upselling and Cross-selling for Support Teams Training Course



28 Dec 2026 - 01 Jan 2027

Boston

7500 € (Per Person)

Ref: #CUS5606_183804

Course Introduction / Overview:

This course transforms customer support from a reactive cost center into a proactive revenue-generating engine. In today's competitive market, every customer interaction is an opportunity to build loyalty and increase customer lifetime value. This program is meticulously designed to equip support professionals with the skills to identify and act on upselling and cross-selling opportunities in a natural, ethical, and customer-centric manner. We delve into the principles of value-based selling, moving beyond simple problem resolution to providing holistic solutions that genuinely benefit the customer. Drawing on concepts from thought leaders like Matthew Dixon, author of "The Effortless Experience," we explore how reducing customer effort and building trust are the foundational pillars for successful sales-through-service. Participants will learn the psychology behind customer purchasing decisions, master non-pushy communication techniques, and understand how to seamlessly integrate these strategies into their daily support workflows. BIG BEN Training Center provides a comprehensive framework that empowers support staff to enhance customer satisfaction while simultaneously driving significant business growth. This is not about aggressive sales tactics; it is about elevating the role of the support professional to that of a trusted advisor.

Target Audience / This training course is suitable for:

- Customer Support Representatives.
- Technical Support Specialists.
- Client Services Managers.
- Help Desk Professionals.
- Customer Success Managers.
- Account Management Support Staff.
- Contact Center Team Leaders.
- Anyone in a customer-facing support role.

Target Sectors and Industries:

- Telecommunications and IT Services.
- Software as a Service (SaaS) and Technology.
- Banking and Financial Services.
- Retail and E-commerce.
- Hospitality and Tourism.
- Insurance and Healthcare Providers.
- Governmental and Public Sector Service Agencies.
- Utilities and Energy Providers.

Target Organizations Departments:

- Customer Service and Support Departments.
- Technical Support and Help Desk Teams.
- Client Relations and Account Management.
- Customer Success and Retention Teams.
- Contact and Call Center Operations.
- Sales Support and Administration.
- Product Management and Development Teams.

Course Offerings:

By the end of this course, the participants will have able to:

- Identify subtle upselling and cross-selling opportunities during routine support interactions.
- Understand the psychological drivers behind customer purchasing decisions.
- Build deep rapport and trust to create a foundation for making recommendations.
- Master active listening skills to uncover unstated customer needs and goals.
- Articulate product value and benefits in a customer-centric manner.
- Transition smoothly from a support conversation to a value-based suggestion.
- Handle customer objections and hesitation with confidence and empathy.
- Utilize CRM tools to track opportunities and personalize customer offers.
- Apply ethical selling principles to ensure long-term customer loyalty.
- Measure the impact of their upselling and cross-selling efforts on key business metrics.
- Develop a proactive mindset focused on solution-providing rather than just problem-solving.

Course Methodology:

The training methodology at BIG BEN Training Center is designed for maximum engagement and practical application. We believe that adult learning is most effective when it is interactive, relevant, and experiential. This course moves beyond traditional lectures to immerse participants in a dynamic learning environment. A significant portion of the training is dedicated to hands-on activities, including realistic role-playing scenarios that simulate real-world customer interactions. Participants will practice their skills in a safe and supportive setting, receiving constructive feedback from both the instructor and their peers. We will analyze detailed case studies from various industries to understand what makes upselling and cross-selling initiatives successful. Group discussions and brainstorming sessions will encourage collaborative problem-solving and the sharing of diverse perspectives. Interactive workshops will focus on developing specific skills, such as crafting compelling value propositions and overcoming common objections. This blended approach ensures that participants not only grasp the theoretical concepts but also build the confidence and competence to apply these valuable skills immediately in their workplace.

Course Agenda (Course Units):

Unit One: The Strategic Role of Support in Business Growth

- The Evolution from Cost Center to Profit Center.
- Defining Upselling, Cross-selling, and Value-Based Selling.
- The Psychology of Customer Loyalty and Retention.
- Ethical Considerations and Building Long-Term Trust.
- Understanding Customer Lifetime Value (CLV).
- Mapping the Customer Journey to Identify Key Touchpoints.
- Aligning Support Goals with Overall Business Objectives.

Unit Two: Mastering Customer-Centric Communication

- The Power of Active and Empathetic Listening.
- Asking Probing Questions to Uncover Deeper Needs.
- Building Instant Rapport and Personal Connections.
- Decoding Verbal and Non-Verbal Customer Cues.
- Communicating Value, Not Just Features.
- The Art of Storytelling in a Support Context.
- Personalizing Communication for Different Customer Personas.

Unit Three: Identifying and Qualifying Opportunities

- Recognizing Buying Signals and Cues in Conversation.
- Using the BANT (Budget, Authority, Need, Timeline) Framework in a Support Context.
- Analyzing Customer History and Usage Data for Clues.
- Timing Your Pitch: When to Introduce an Offer.
- Differentiating Between a Customer Need and a Fleeting Interest.
- Creating a Seamless Transition from a Support Issue to a Sales Opportunity.
- Leveraging Customer Feedback as a Source for Opportunities.

Unit Four: Effective Upselling and Cross-selling Techniques

- The Tiered Upsell: Moving Customers to a Higher Plan.
- The Feature-Based Upsell: Highlighting Premium Functionality.
- The Complementary Cross-sell: Suggesting Related Products or Services.
- Product Bundling Strategies to Increase Perceived Value.
- Presenting Offers as Solutions, Not Sales Pitches.
- Handling Objections: The Feel, Felt, Found Method.
- Closing the Conversation and Defining Next Steps.

Unit Five: Implementation, Tools, and Performance Measurement

- Integrating Upselling Activities into the CRM Workflow.
- Developing Scripts and Talk Tracks (and Knowing When to Deviate).
- Setting Realistic KPIs for Upselling and Cross-selling.
- Role-Playing Complex Customer Scenarios.
- Techniques for Effective Follow-up Without Being Pushy.
- Conducting A/B Tests on Different Offers and Approaches.
- Creating a Culture of Continuous Learning and Improvement.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How can an organization's culture shift to view customer support not as a cost center, but as a crucial value and revenue generation engine?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by fundamentally reframing the concept of sales within a support environment. Unlike traditional sales training that can feel aggressive or misaligned with the supportive nature of the role, our curriculum is built on a foundation of customer advocacy and ethical practice. We focus on a consultative approach, teaching participants how to enhance the customer experience by offering genuine, value-added solutions, which in turn naturally leads to increased revenue. The core philosophy is that the most effective upselling and cross-selling comes from a place of deep understanding and a sincere desire to help the customer succeed. We dedicate significant time to the psychological aspects of the service-to-sales transition, helping support professionals build the confidence to make recommendations without feeling like they are compromising their primary role as a problem-solver. The program emphasizes practical, real-world application through extensive role-playing and case study analysis, ensuring that the skills learned are not just theoretical but immediately applicable. This is not about learning sales scripts; it is about developing the strategic mindset of a trusted customer advisor.