



The Cross-Selling Conundrum

Unlocking growth without significant disruption, enabled by technology and AI



Executive Summary

- Many companies expect cross-selling synergies following acquisitions or a shift to a platform model, but revenue lift often fails to meet expectations due to poor execution.
- The most common barrier is last-mile execution: sellers continue to default to familiar products and motions, even when strategy, messaging, and pricing are sound.
- Changing seller behavior requires targeted incentives, clear ownership of opportunities, and support that reduces perceived risk in pursuing larger, multi-solution deals.
- Technology and AI can accelerate this shift by identifying accounts with cross-sell potential, guiding account planning, supporting call preparation and follow-up, cross-sell plays, and enabling managers to coach more effectively.
- Full sales transformation is not always required. Targeted changes, paired with the right tools and accountability mechanisms, can unlock meaningful growth within a fiscal year.

	H1	FY End
Pipeline Coverage	1.5X	3.1x
% Deals with Cross-Sell	<15%	>50%
Average Enterprise Deal Size	\$85,000	\$106,250
Revenue Attainment	70%	107%

After a series of acquisitions or a pivot to a platform model, most companies expect to unlock cross-selling synergies across their combined product portfolio. The logic is sound: more offerings should lead to more revenue per customer.

But in practice, those synergies often fail to materialize. Sellers continue to focus on the products they know, pipeline growth stalls, and boards or PE sponsors begin to question execution. Leadership cycles through pricing, messaging, and even personnel changes – yet the performance gap remains.

At its core, it's an execution problem. Organizations consistently underestimate what it takes for sales teams to adopt new motions. Without a clear plan for how sellers will work, collaborate, and engage customers in the field – and without supporting tools to make the shift easier, well-designed strategies break down in the "last mile."

Executing in the last mile requires planful attention to several key factors: Incentives, talent, territory design, and tools. This is demonstrated in the case of a portfolio company we recently worked with that was facing this exact challenge.

Case Example: Unlocking Cross-Selling Potential

The Challenge

A US-based technology company had acquired several companies in order to build a holistic solution and expand market share. By midyear, it was **off target by 30%** and facing a widening pipeline gap. After replacing the CRO and CMO, the CEO needed a fresh take on how to gain the value expected from selling the full portfolio. Blue Ridge Partners was engaged to help the CEO and new leadership team capture the value expected from selling the integrated portfolio.

Diagnosis and Gap Analysis

BRP assessed that the messaging and market were ready for the solutions as designed and addressed the needed pricing and packaging updates. Execution was identified as a critical barrier: enterprise sellers were the lynchpin to enabling the strategy to deliver results. We evaluated the key components and crafted a swift plan of action.

Most cross-selling synergies fail not because of strategy, but because sellers never adopt the new motions.

Compensation was a central challenge. Sellers could make their number selling their traditional point-solution products. Team selling was seen as a negative because it could slow down their usual sales process and put the deal at risk – the bigger the deal, the more buyers involved, which increased the chance a deal would fail due to lack of decision. With the fiscal year underway, a compensation structure change was undesirable. Instead, we recommended a cross-selling sales performance incentive

fund and accelerators to incentivize collaboration. Cross-selling sales plays provided a map for how to work across teams to maximize opportunities and take advantage of the available spiffs.

Culture and skills gaps also constrained cross-selling adoption. The organization had a strong culture of seller independence, and territory restructuring, while necessary, would be addressed in the new fiscal year. The sellers were effectively order takers, waiting for a client to need more of their solution. They lacked key sales skills like discovery, identifying value, and visioning a solution, among others. Building the necessary solution-selling skills takes years, and hiring and ramping up an entirely new sales team mid-year was not feasible.

Targeted Solution

To hit the number for the current year and begin to drive the change needed, we recommended a light team selling approach, complemented by technology to help address the knowledge and skills that they did not currently possess to effectively cross-sell.

Identifying High-Potential Accounts:

To determine which customers offered the greatest cross-sell opportunity, we pulled data from multiple CRM systems, leveraged AI to detect gaps in product and service coverage, and mapped accounts likely to need multiple lines of business based on industry, segment, and geography. This analysis produced prescriptive, prioritized guides for sellers to expand existing clients and pursue high-value opportunities.

- **Account Targeting:** Leveraged AI large language models (LLM) to help sellers focus on the highest potential opportunities, identifying the accounts most likely to need the suite of products and generating territory plans tailored for cross-selling.
- **Account Planning:** Applied AI LLM to help sellers hone their approach and aid in targeting and engaging with high-priority accounts.
- **Job Aids:** Utilized an AI application-building platform to rapidly create tailored job aids specific to industry, geography, and segment for sellers to identify opportunities, and rolled out mobile-first AI-enabled training software. Cross-selling sales plays made execution smoother and called out when to bring in unfamiliar team members.
- **Call Support:** Implemented AI conversation intelligence software with call recording features to help the seller and manager identify anything missed for immediate follow-up after client calls.
- **Deal Review Panel:** Created a review panel early in the sales process to help identify potential areas where customers needed additional services.

CEO and CRO involvement was critical to driving adoption of this new way of selling. Holding each level of the sales organization accountable took focus and consistency in using the territory and account plans, leveraging the technology provided to identify opportunities, and driving larger deals through active coaching and the deal review panel.

The Result: Meaningful Cross-Selling Improvement Over the Course of 6 Weeks

By using technology to supplement knowledge and skills along with a relentless focus on cross-selling:

- Average deal size increased by 25% in the first quarter
- Fiscal year ended at 107% of annual growth target
- Win rates for complex enterprise deals improved in the second half by 40%

This was driven by a stronger customer value proposition with more holistic solutions, better sales support, and coordinated team selling.

Sustainable change will require longer-term transformation – improving sales skills, changing compensation plans, rethinking territory design, and hiring solution sellers, but companies frequently do not have the time or budget for a large-scale transformation. Fast and meaningful progress can be achieved by focusing on the key levers for cross-selling and leveraging technology to accelerate execution.

Lessons Learned: Levers That Drive Cross-Selling Success

Sustainable transformation takes time – new compensation plans, territory redesigns, and skill-building – but immediate gains are possible when leaders focus on the right levers.

Key lessons from this engagement:

- **Define the sales motion early:** Determine who will sell, how, and why early in the process.
- **Assess your sales team:** Evaluate if sellers have the skills and motivation to sell a portfolio of solutions.
- **Shape the culture:** If independence is pervasive, determine what needs to change to reinforce solution selling and collaboration.
- **Enable knowledge and skill development:** Implement change management resources and leverage AI to accelerate adoption.
- **Keep leadership aligned:** The CEO and CRO must drive the change and inspect execution consistently.

Conclusion

Cross-selling is one of the most powerful, yet often elusive levers for value creation in portfolio companies. Those that successfully unlock cross-selling value focus on the practical levers that drive seller behavior, while using technology to lower the friction of adopting new motions. You don't need to rebuild the sales organization to make progress – disciplined attention to incentives, ownership, skills support, and tools can accelerate revenue growth within a fiscal year and lay the groundwork for more durable change over time.

Why Blue Ridge Partners?

At Blue Ridge Partners, we focus exclusively on helping companies accelerate profitable revenue growth – the #1 driver of value creation. We’ve earned high marks from private equity firms by delivering material, rapid, and cost-effective results for their portfolio companies.

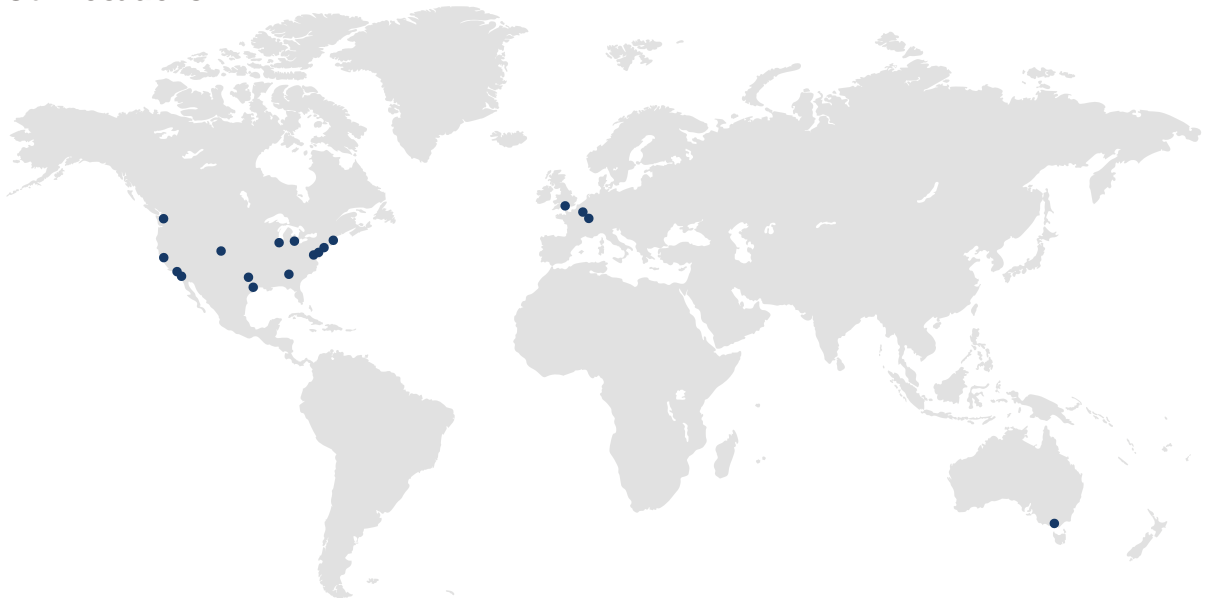
Our work spans value creation planning, commercial model transitions, strategic pricing, sales effectiveness, and commercial due diligence. Our Managing Directors combine top-tier strategy consulting and operating experience, and we’re known for rolling up our sleeves, taking a pragmatic, hands-on approach, and focusing on the “how” of execution to drive measurable P&L impact.

Increasingly, we help clients leverage Commercial AI to accelerate growth. Through our Commercial AI Center of Excellence (CoE), we guide AI investments toward real business problems and commercial metrics – not just tools – to ensure tangible results.

Since 2002, we’ve partnered with over 130 top-tier PE firms and 1,300 companies worldwide to create lasting value across the investment lifecycle.

For further information please contact us at info@blueridgepartners.com or visit us at www.blueridgepartners.com.

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