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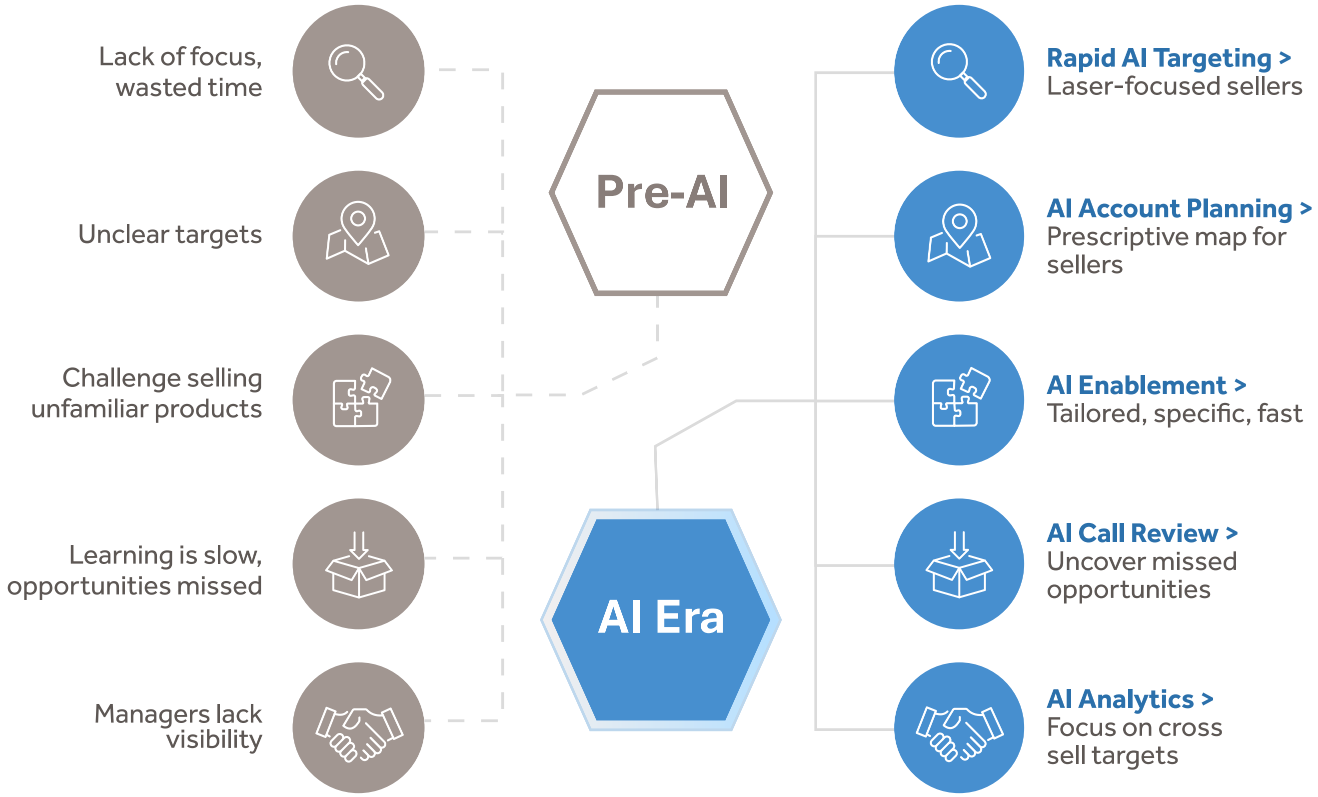
AI Has Changed the Game of Cross-Selling

A Case Example of Lean, Impactful Solutions to a Decades-Old Problem

Cross-selling is a major growth lever, yet remains ineffective in most organizations, particularly in buy-and-build strategies where the investment thesis often hinges on cross-sell synergies. Firms build portfolios expecting 1+1 to equal 3, but those synergies rarely materialize at scale. The challenge isn't the strategy. It's execution. This executive briefing highlights where execution breaks down, and what leading companies are doing differently to drive results.

Cross-selling is a meaningful lever, traditionally fraught with challenges



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Executive Summary

- **Many companies expect cross-selling synergies across product lines,** but revenue lift often fails to meet expectations due to poor execution. This is a common challenge in M&A situations where sales teams are expected to sell a new, broader range of products and services.
- **Despite decades of focus, cross-selling remains a persistent execution challenge.**
  - The first barrier is last-mile sales execution. Sellers continue to default to familiar products and sales motions, even when strategy, messaging, and pricing are sound.
  - The second is lack of true product integration. Executives often perceive meaningful product integration when it does not truly exist.
- **However, companies are finding a step-change solution with AI support:**
  - Targeting accounts with the greatest cross-sell potential.
  - Guiding account planning by prioritizing sales plays.
  - Feeding sales teams the right questions to ask and corresponding sales messages as they prepare for sales calls.
  - Enabling managers to coach their teams more effectively.
- **In one recent engagement,** a portfolio company combined these levers to rapidly change seller behavior, embedding cross-selling into the sales motion and **increasing average deal size by 25%** within weeks, along with improvements in win rates, pipeline coverage, and cross-sell penetration.
- **This does not require a significant transformation effort.** Targeted changes, paired with the right tools and accountability mechanisms, can unlock meaningful growth within a few months, providing in-year payback on investments

Why Cross-Selling Remains So Difficult

The challenge isn't a lack of intent. Most sales leaders understand the value of cross-selling and actively encourage it. The problem is that companies consistently misdiagnose why sellers aren't cross-selling effectively, and as a result, they invest in the wrong solutions.

Here's what's really happening on the ground:

- **Sellers are focused on the wrong accounts and relationships.** They spend time cultivating relationships with contacts who can't influence broader buying decisions, while ignoring the parts of the business where real cross-sell opportunities exist.
- **Sellers take the path of least resistance.** It's not intentional – it's human nature. Selling what you know to people you already know is easier and feels lower risk than navigating complex, multi-stakeholder deals. The problem is that this path doesn't ring the cash register.
- **The selling motion has shifted, but sellers haven't adapted.** Many organizations have evolved from selling simple point solutions to selling integrated platforms or suites. That requires a fundamentally different motion – one that involves discovery, value articulation, multi-threading, and executive engagement. Most sellers weren't hired for that motion and haven't been trained for it. 62% of companies say they offer 11+ products for target customers but only about half of their customers buy more than 3 products, leaving a huge gap between expectation and reality. [1]

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1. Based on Blue Ridge Partners' survey of operating partners & deal partners in February 2026.

- **Sellers' hands are tied when products have clunky integrations or customer onboarding creates a delay in cross-selling opportunities.** CEOs often don't have objective insight into these challenges that are locking up growth potential and underestimate the challenge of cross-selling.
- **Sellers are stuck firefighting instead of selling.** They're pulled into IT troubleshooting, accounts receivable issues, and operational escalations – activities that feel urgent but don't drive revenue growth.

The result?

68% of companies report falling short of cross-sales targets, with 49% falling significantly below their goals.[1] Companies pour resources into strategy decks, competitive positioning, new pricing models, and messaging frameworks. These are all important, but none of it matters if sellers continue doing what they've always done.

The Turning Point: Redesigning Execution with AI as an Enabler

For decades, companies have attempted to solve the cross-selling problem through training programs, reorganizations, compensation redesigns, and CRM initiatives. These approaches help, but they're slow, expensive, and often fail to change day-to-day seller behavior. The old, faulty thinking sounds like this: "Cross-sell fails without a system of record that sees the whole account."

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The real shift is not just technology - it is the redesign of how cross-selling is executed day to day. AI has changed the game by making that redesigned motion scalable and repeatable. It provides a practical tool that can reduce the knowledge, skill, and experience required for effective cross-selling. AI doesn't replace the need for capable sellers or sound strategy, but it can dramatically accelerate results by:

- **Directing sellers to the highest-potential accounts and white space opportunities.**
- **Providing account-specific guidance on what to say, who to target, and what questions to ask.**
- **Enabling sellers who lack deep solution-selling skills to execute more sophisticated motions.**
- **Surfacing missed opportunities in real-time through conversation intelligence.**
- **Giving managers visibility into execution gaps so they can coach more effectively.**

This shift, from relying solely on seller capability to augmenting sellers with AI-driven intelligence, is what creates the "awakening moment" for cross-selling. It's not a replacement for good sales fundamentals, but it's a force multiplier that makes those fundamentals accessible to a broader range of sellers.

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1. Based on Blue Ridge Partners' survey of operating partners & deal partners in February 2026.

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Case Example: Unlocking Cross-Selling Potential

The Challenge

A US-based technology company had acquired several companies 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

We started by confirming that the market was ready for the solutions as designed and the company's messaging, pricing, and packaging were sound. Execution was the critical barrier: enterprise sellers were the lynchpin to enabling the strategy to deliver results. Compensation was a central challenge. Sellers could hit their quota by 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 not practical.

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. So, what could be done for quick impact?

Targeted Solution

To achieve the sales targets 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.

The intervention focused on 12 specific tactical changes, each designed to reduce friction, provide clarity, and create accountability:

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Where to Focus:
Targeting the Right Accounts and Opportunities

1. Account Targeting & Opportunity Mapping

We pulled data from multiple fragmented CRM systems and used AI (large language models) to identify which existing customers had the highest cross-sell potential. The process involved:

- Defining an ideal customer profile (ICP) based on industry, geography, and segment.
- Extracting customer data from multiple CRMs and consolidating it into a single dataset.
- Converting product ownership into binary indicators (has Product A: yes/no, has Product B: yes/no).
- Using Claude AI to analyze patterns: "Based on companies like this, what products should they be buying that they aren't?"
- Generating a prioritized list of cross-sell opportunities for each of the 75 enterprise and strategic sellers.

This gave sellers a clear, data-driven view of where to focus rather than relying on gut feel or relationship history.

2. Economic Sizing of White Space

We quantified the revenue and profit opportunity in each account's white space, giving sellers an economic imperative to prioritize certain accounts over others.

How to Execute:
Enabling a Structured Cross-Selling Motion

3. AI-Enabled Account Planning for "Tier A" Accounts

For high-priority accounts, we used AI to generate tailored account plans that included:

- Who to call (specific personas and titles).
- What to say about the mandate and business drivers they care about.
- What questions to ask to uncover needs.
- Suggested next steps based on account history and industry context.

This reduced the planning burden on sellers and gave them confidence in their approach.

4. Job Aids and Mobile-First Training

We built tailored job aids specific to industry, geography, and segment using an AI application-building platform. These were delivered through mobile-first AI-enabled training software, making it easy for sellers to access guidance in the field.

5. Cross-Selling Sales Plays

We created clear, step-by-step sales plays that showed sellers how to execute team selling: when to bring in specialists, how to coordinate across product lines, and how to navigate internal hand-offs.

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How to Motivate and Align: Driving Collaboration and Behavior Change

6. Compensation Incentives Without Restructuring

Rather than overhauling compensation mid-year, we introduced a President's Club incentive and cross-sell accelerators (spiffs) to make cross-selling immediately attractive. This created a carrot-and-stick dynamic without the disruption of a full comp plan redesign.

7. Addressing the "Farmer" Challenge

Most companies assign their least qualified hunters to account management roles. These sellers don't have the muscle to proactively pursue new opportunities within existing accounts. Our enablement tools and plays gave them a repeatable motion they could execute even without deep hunting

8. Internal Value Selling

We helped sellers understand and communicate internally why cross-selling mattered to customers, not just to the company. This reframed cross-selling from "we need to sell more" to "customers actually need this, and we're not serving them well if we don't offer it."

How to Inspect and Improve: Creating Visibility and Accountability

9. AI Conversation Intelligence

We implemented sales call recording to analyze sales calls. The platform listened for specific keywords and patterns. When sellers asked the right discovery questions but failed to recognize buying signals in the customer's response, the tool flagged it. This allowed sellers and managers to circle back with targeted follow-up, often within hours of the call.

10. Cross-Selling Council

For Tier A accounts, we established a Cross-Selling Council where reps and managers met regularly to discuss strategies, share wins, and troubleshoot challenges. Initially, participation was mandated. Once sellers saw peers closing larger deals and earning accelerators, they began volunteering to join.

11. Activity Metrics and Leaderboards

We tracked and published activity metrics: How many cross-sell discovery calls did each seller make? How many multi-product proposals were submitted? Leaderboards created healthy peer pressure and made behavior change visible across the team.

12. Deal Review Panel

We created a review panel early in the sales process to help identify potential areas where customers needed additional services. This external perspective often caught cross-sell opportunities sellers had missed.

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%.**
- **The number of closed deals that contained cross sold products increased nearly by 4x** (from <15% to >50% of deals including cross-sell elements).
- **Pipeline coverage improved from 1.5x to 3.1x.**

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. There are dozens of changes organizations could make to improve cross-selling. The mistake often made is trying to implement all of them at once. Sales teams need focus. Identify the few changes that will have the most immediate impact, execute them with discipline, and build from there.

- 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.
- Assess your product integration and onboarding dependency: Get an objective look at what is holding customers and sellers back.
- 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.

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Why Blue Ridge Partners?

We focus exclusively on helping companies accelerate profitable revenue growth, the #1 driver of value creation. Since 2002, we have partnered with over 1,300 companies and 130 private equity firms worldwide to create lasting value across the full investment lifecycle.

We are best known for quickly identifying the 1–3 changes that will most impact revenue growth and EBITDA performance (25% of the challenge) and then making the required adjustments within the commercial organization that cause these changes to stick and be consistently executed over time (75% of the challenge). Because we focus on execution, results are typically visible quickly, often within the first 1–2 quarters. Our approach to accelerating growth is agile by design and enabled by AI.

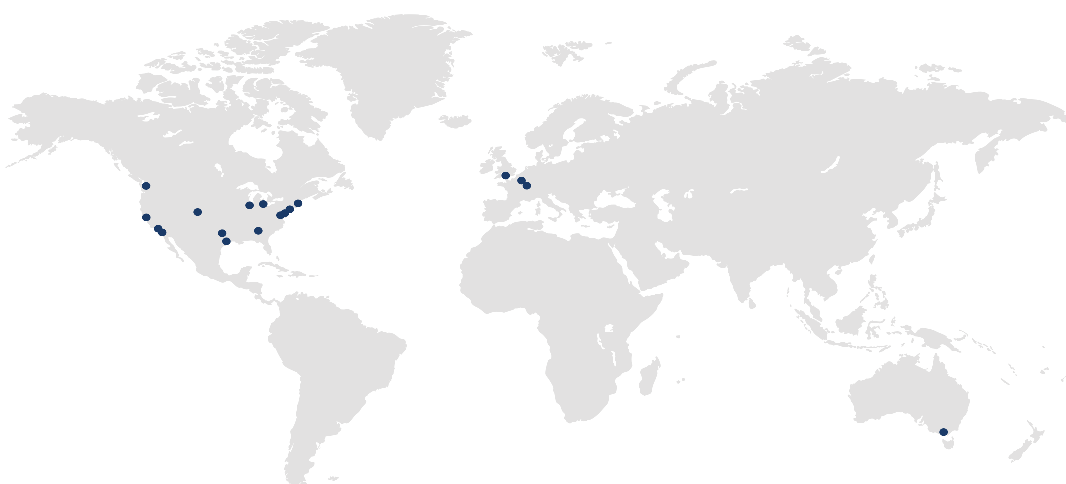
Most commercial transformations do not fail because the strategy is wrong. They fail because execution never becomes consistent. The actions are identified, the plans are built, the initiatives are launched, and then performance drifts because teams do not execute consistently and leadership cannot see where it is breaking.

That is what we call an execution control problem, and it is the problem we solve to translate identified opportunities into sustained revenue and EBITDA performance. We work directly with management teams to define the actions that drive revenue growth, ensure they happen consistently in the field, and make that execution visible in real time. We do not rely on initial adoption or intent. We build systems that make execution repeatable, enforceable, and observable across the organization.

We operate wherever execution commonly breaks within the commercial organization, including sales, marketing, revenue operations, customer service and pricing. We apply the same lens in due diligence to assess execution capabilities and risks within the commercial organization.

We do not stop at recommendations or implementation. We continue through executional control to ensure that value creation is sustained for current and future owners of the business.

Our Locations



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