AgencyGod

THE FREE PLAYBOOK

● AGENCY GROWTH · EXPANSION REVENUE

The Upsell & Expansion Playbook

Your next **$10K a month** is not hiding in cold outreach. It is sitting in the 8 to 20 clients you already have. Inside: the 4-rung expansion ladder, the timing triggers, the word-for-word rate-increase and cross-sell scripts, the QBR that surfaces the upsell, and the net-revenue-retention math that proves it.

- The NRR scoreboard
- The 4-rung expansion ladder
- 5 timing triggers
- The QBR agenda
- 6 word-for-word scripts
- The auto-raise clause

A playbook from **AgencyGod**
agencygod.com

$10K GTD

The $10,000 Guarantee
You get the result or you get paid $10,000

STOP GRINDING FOR STRANGERS

The cheapest client you will ever close already pays you.

You deliver a great result, then never think to ask for more work, so you leave money on the table every single month.

Then growth season comes and you do the thing every owner does. You assume you need more leads. You go back to cold outreach, to the unsubscribes and the tire-kickers and the "let me think about it." Meanwhile a client who already trusts you, who already pays you, who already saw you produce, is sitting right there ready to buy more. You just never offered it.

THE MATH YOU ARE IGNORING

A new prospect closes at **5 to 20%.** An existing client closes at **60 to 70%.** That is the single most lopsided number in your whole business, and most owners spend 90% of their selling energy on the 5% side of it.

Your next $10K a month is not a new logo. It is a bigger invoice to a client you already have.

Here is what stops you. Upselling feels gross. It feels like nickel-and-diming someone who already pays you. So you keep charging a client the same $2,500 you quoted two years ago, while you quietly do triple the work. This playbook fixes both problems. It gives you a ladder of expansions that are obvious and earned, and the exact words to raise the conversation without sounding like you are reaching into their pocket.

60-70%
Close rate selling to an existing client, vs 5 to 20% for a new prospect
Farris et al., Marketing Metrics

~1/3
The cost to win expansion revenue vs a new-logo dollar
TSIA; HBR / Bain & Co.

61%
Of B2B revenue comes from renewal and expansion, not new logos
Forrester, April 2025

THE NRR SCOREBOARD

If you cannot name your retention number, you are leaking and you do not know it.

Net Revenue Retention is the one number that tells you whether your existing book is growing or quietly bleeding. Most owners only notice the bank account when a client cancels. Here is the formula, then a worked example.

THE ONE EQUATION

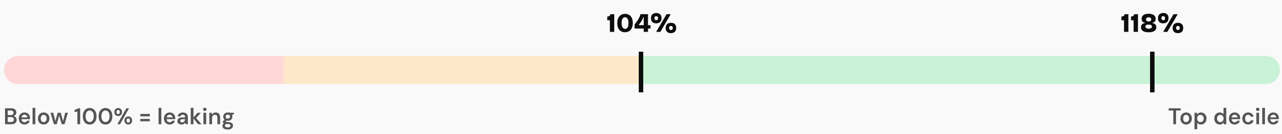
NRR = (starting MRR + expansion − downgrades − churn) ÷ starting MRR

Above 100%, your existing clients grow your revenue even if you never sign a new one. Below 100%, you are running uphill just to stay flat.

Worked example. You start the period at $40,000 in monthly recurring revenue. You expand three accounts for $8,000, and one client downgrades and another leaves for $2,000 combined.

STARTING MRR	+ EXPANSION	− DOWN / CHURN	YOUR NRR
$40K	+$8K	-$2K	115%

($40K + $8K − $2K) ÷ $40K = **115%.** That means even with zero new clients, this book grows 15% on its own. Now put it on a scale so you know where you actually stand.



104% is the median.

118% is the 90th percentile.

Median private SaaS NRR ~104%, 90th percentile ~118%. SaaS Capital, 2025 private SaaS retention benchmarking. Agency MRR behaves similarly on retainer; treat as a directional target, not a promise.

THE PER-CLIENT TRACKER

One sheet that ends the "I just notice when they cancel" problem

List every active client. Fill the current retainer, the next rung you can sell, and the trigger you are waiting on. Add the expansion column and you have your NRR for the period. Update it the first Friday of every month.

CLIENT	CURRENT / MO	NEXT RUNG	TRIGGER TO WAIT FOR	+ EXPANSION
Apex Roofing	$3,500	Rung 1 raise	Renewal in 45 days	**+$350**
Lumen Dental	$2,500	Rung 2 add SEO	Hit lead goal	**+$2,000**
Vero Med Spa	$4,000	Rung 3 location 2	New site opening	**+$3,500**
			Expansion this period (from 3 named above)	**+$5,850**

> **Three clients on the list above just added $5,850 a month in recurring revenue. That is one new $5K retainer you did not have to chase.**

Notice what the tracker forces. You stop reacting to cancellations and start running every account toward a named next step. The "Next rung" column is the expansion ladder you will build on the next page. The "Trigger" column is the timing rule that keeps the ask from feeling salesy. You are not guessing anymore. You are managing a book.

FOUR RUNGS · EASIEST FIRST

Climb in order. The bottom rung is the fastest yes you will ever get.

Do not jump to the top. Each rung earns the next. Dollar examples use the real agency retainer band: a $3,500 average, working range $1,500 to $10,000.

RUNG 1

Raise the existing retainer

EASIEST

A scheduled **8 to 12%** increase, framed as keeping senior oversight on the account. No new scope, no new delivery. This is the rung owners skip for years while quietly doing triple the work.

$3,500 → **$3,850**

+$350/mo, zero extra delivery

RUNG 2

Add an adjacent service

EASY

The client who buys SEO from you also needs paid. The one running ads needs email. Sell the next service that **removes the bottleneck capping the result you already produced.**

$3,500 → **$7,500**

bundled-retainer average

RUNG 3

Add seats, locations, or brands

MEDIUM

The dentist opens a second practice. The franchise adds three units. The brand launches a sister label. You already have the playbook. **You just run it again and bill for each instance.**

$4,000 → **$8,000+**

per added location / brand

RUNG 4

Move to a performance or strategy tier

HIGHEST

Once trust is deep, graduate them off a flat retainer onto a higher base plus rev-share, or a strategy-led tier where you own the number. **The most exposure, the most upside, and only after rungs 1 to 3 are paid.**

$7,500 → **$10K+**

base + upside on results

Retainer band and bundled average per Stackmatix and ClicksGeek 2025-2026 agency pricing data ($1,500 to $10,000 working range, ~$3,500 average). Use round numbers; figures are examples, not quotes.

THE TIMING TRIGGERS

Never pitch before a win. Pitch right after one.

The reason upselling feels gross is almost always bad timing. Ask in a quiet month and you sound like you are reaching for money. Ask the day after you delivered a result and the client is already nodding. **37% of reps say upsells land best right after you deliver on a goal.**

1 · You just hit the goal

The campaign cleared target. The leads landed. **This is the single best window.** *"We hit the number. Here is what doubling down looks like."*

2 · They are approaching a limit

The current scope is maxing out. Lead volume is capped by spend, or the calendar is full. **The ceiling is the upsell.** Show them the wall, then the way through it.

3 · A new stakeholder shows up

A new marketing lead, a new partner, a new owner. They want to make a mark and have fresh budget to do it. **Re-pitch the full vision, not the existing scope.**

4 · Budget season opens

Q4 planning, fiscal-year reset, January re-budget. Money is being allocated right now. **Get your number into the plan before someone else gets theirs in.**

5 · A milestone lands

One year together, a funding round, a product launch, a record month. Use the moment as the natural reason to step the relationship up a rung.

THE RULE THAT KILLS THE "SALESY" FEELING

An upsell tied to a win is a recommendation. An upsell tied to nothing is a pitch. **Always anchor the ask to a result you just produced or a ceiling they just hit.** The client never feels sold, because you are pointing at the same scoreboard they are looking at.

37% of sales reps say upsells work best right after delivering on a customer goal. HubSpot, 2025 State of Sales Report (1,000+ sales professionals).

THE QBR THAT SURFACES UPSELLS

Stop reading a dashboard out loud. Run the meeting that sells.

Most QBRs are an owner narrating Google Analytics screenshots while nobody buys anything. A real QBR is built to surface the next rung. Clients who get regular QBRs are **twice as likely to renew.**

THE 3-DAY PREP CHECKLIST

- **DAY -3** — **Pull results vs the goal you set at the start.** One headline number, not fourteen. Find the gap between where they are and where they want to be.
- **DAY -2** — **Name the bottleneck capping their growth** and the exact rung that removes it. Price it. Decide which trigger from page 6 you are standing on.
- **DAY -1** — **Build 5 slides, not 25.** Rehearse the ask out loud once. Send a calendar hold framed as a strategy review, never a "check-in."

THE 5-SLIDE AGENDA

1 Results vs goal
One scoreboard slide. **"Here is the number we set, and here is where we landed."** Lead with the win you produced.

2 What we learned
The two or three insights this quarter handed you. Proof you are thinking about their business, not just running tasks.

3 The gap we see
The bottleneck now capping growth. Name it plainly. This is the slide that makes the upsell their idea, not yours.

4 The recommendation
The exact rung that closes the gap, with the dollar figure and what it produces. One option, clearly the right one.

5 The ask
A direct, low-friction next step. **"Want me to send the updated terms so we start next month?"** Then stop talking.

Customers with regular QBRs are roughly 2x as likely to renew. Staircase AI study, cited by Gainsight (2024). QBRs are correlated with higher retention, not a guarantee of it.

THE SCRIPTS · RATE INCREASE

How to raise the retainer without losing the client

Fill the red blanks. Deliver these by phone first, then confirm in writing. Most increases close when you frame the raise as protecting their result, not padding your margin.

1 The scheduled rate-increase opener

Phone call, 60 to 90 days before renewal

"Quick heads up before renewal. **Starting [DATE]** the retainer moves to [$NEW] a month. That keeps a senior strategist on the account instead of handing it down, which is exactly what got you **[the result]** this year. Nothing else changes. I wanted you to hear it from me, not see it on an invoice."

2 When they push back on the raise

Acknowledge, then re-anchor on the result

"Totally fair to ask. Here is the honest version. The work we are doing now is [2-3x] what the original scope covered, and I would rather raise it a little and keep the same team on you than quietly cut corners. You are still well under what a new client pays for this exact work today."

3 The "we never raised it" catch-up

For the client still paying your two-year-old price

"I will be straight with you. I have not touched your rate in [2 years] while the scope kept growing. I am fixing that now with a single step up to [$NEW], and then we move to a small annual adjustment so this never becomes a big conversation again."

Phone first, email to confirm, **60 to 90 days before renewal.** Never spring a raise on an invoice. The clause on page 10 makes this automatic so you never have to dread the call again.

THE SCRIPTS · CROSS-SELL & TIER

How to add the next service so it feels like their idea

Every one of these is anchored to a win or a ceiling. You are not pitching. You are pointing at the gap on the same scoreboard they are watching.

4 The cross-sell opener

Use right after you hit a goal (Trigger 1)

"We hit **[the result]**. Here is what is interesting. The thing now capping your growth is **[the gap, e.g. your follow-up, your landing page, your paid side]**. Right now we are filling the top of the funnel and watching leads leak out the bottom. Closing that gap looks like **[the next service]**. Want me to map what that adds?"

5 The seats / locations / brands add

Use on a milestone or expansion (Trigger 5)

"Congrats on **[the new location / brand]**. The system we built for the first one is already proven, so spinning it up for the second is mostly a matter of pointing it at the new market. We can have it live in **[timeframe]**. It runs at **[$X]** for the added unit. Want me to scope it this week?"

6 The graduate-to-a-tier move

Only after rungs 1 to 3 are paid and trust is deep

"You have seen us produce for **[a year]**. I want to propose something bigger. A lower flat base plus a share of the upside we create, so we are fully on the hook for the number, not just the tasks. **We only win more when you do.** Here is what that structure looks like."

The phone-first rule applies to all six. A real conversation closes the expansion. The email exists only to confirm what you already agreed out loud.

THE AUTO-RAISE CLAUSE

Put the raise in the contract so you never have to ask for it

Bake a standard escalation into the agreement and the raise becomes a scheduled event the client already agreed to.

DROP THIS INTO YOUR RETAINER AGREEMENT

"Pricing renews each **[anniversary month]** at the greater of the prevailing CPI or **[X%]**, applied automatically unless either party gives 30 days' written notice. Scope additions beyond the agreed deliverables are quoted separately."

Why it works. The increase is no longer your decision in the moment. It is a term they signed. CPI gives it an objective anchor, and the floor percentage protects you in low-inflation years. You still send the page-8 heads-up call as a courtesy, but the answer is already yes.

⚡ THE ONE NUMBER THAT DECIDES IT

Retainer clients churn at roughly **18% a year.** Project clients churn at **42%.** A built-in raise plus a recurring structure is not just more revenue. It is **2.3x better retention**, because the relationship is designed to compound instead of reset.

Here is the compounding part most owners miss. An 8% raise on a $3,500 retainer is $280 a month. Run it across ten clients and it is $2,800 a month, $33,600 a year, with zero new delivery and zero new sales calls.

Retainer vs project churn rates: Focus Digital, Average Marketing Agency Churn: 2026 Report. CPI-escalation clauses are standard commercial terms; consult your own counsel before adopting contract language.

THE PROOF

Expansion revenue is the cheapest revenue in your entire business

When the upsell feels gross, it is fear talking, not data. Here is what the data actually says about selling to the clients you already have.

60-70%

Close rate to an existing client

Versus 5 to 20% for a new prospect. The most lopsided number in your business.

~1/3

Cost of expansion vs a new logo

Expansion revenue costs about a third of a new-logo dollar (TSIA).

25-95%

Profit lift from a 5% retention gain

Small retention gains move profit more than almost any new-client push.

61% **of all B2B revenue comes from renewal and expansion**, not from new logos. You are likely under-investing in the channel that already funds most of your business.

Forrester, How Well Are You Protecting Existing Customer Revenue?, April 2025

40% Median **expansion ARR rose from ~25% of new revenue in 2022 to ~40% in 2024.** The best operators are leaning harder into their existing book every year.

SaaS Capital / Maxio, 2025 SaaS Benchmark Report

2x Clients who get **regular QBRs are roughly twice as likely to renew.** The meeting on page 7 is a retention tool before it is an upsell tool.

Staircase AI, cited by Gainsight, 2024

READ IT ONE MORE TIME

You can spend the next quarter grinding cold outreach to close strangers at 5 to 20%. Or you can run this playbook across the 8 to 20 clients you already have, who close at 60 to 70%, and add **$10K to $20K a month** without a single new sales call. **The vein is already open. Most owners just never mine it.**

● YOUR NEXT MOVE

You can run the ladder. We can build the whole machine with you.

Expansion revenue only compounds when the client stays, the result keeps landing, and a new client is always ready to replace the one who leaves. That is the chain we build and run **with you**: booked calls that show, a discovery that closes, a retention system that climbs the ladder, all backed by the $10,000 guarantee.

Every month you leave the existing book unmined is a month of grinding for strangers at 5 to 20% while a 60 to 70% yes sits in your inbox. **Apply to AgencyGod now.** We onboard only a handful of agencies a month, and every spot comes with the $10,000 guarantee.

$10K GTD You get the result or you get paid **$10,000**

Apply to AgencyGod →

Free 30-min strategy call · limited monthly intake

agencygod.com

Results mentioned are real client outcomes and are not typical. Individual results vary with effort, market, and execution. The $10,000 guarantee is real and subject to the program's written enrollment agreement terms.