

Upselling – Now We Have the Data

Turning Data Into Growth for a
Pier Installation Company

DATA SYSTEMS | PROCESS IMPROVEMENT | REVENUE GROWTH



\$4M+

UPSELL REVENUE



25%

OF CUSTOMERS DROPPED
DEEMED TOO HARD TO SERVICE



REAL-TIME

INSTALLATION STATUS
BY LAKE



THE SITUATION

A pier installation company had fragmented data and inconsistent tracking of their seasonal installation portfolio, making it difficult to understand account performance and identify growth opportunities.



THE CHALLENGE

Critical account information was spread across multiple sources, with manual data entry and limited visibility into labor hours, status by lake, and gross margins. The company needed a better way to track performance, identify underperforming accounts, and target customers for upselling into new systems.



OUR APPROACH

- Defined the critical information needed for each account and designed a simple, organized database.
- Instructed account managers to input data daily, ensuring consistent and accurate tracking.
- Provided real-time visibility into installation status by lake, man hours per account, and gross margins.
- Analyzed the data to identify underperforming accounts and target customers for upselling into new systems.



WHY IT WORKED

- The system was simple and easy for the team to use daily, which drove consistent data entry.
- The team quickly saw the value of the data, and it became the backbone of their operations.
- Clear, real-time insights enabled better decision-making, including which customers to retain, which to drop, and where to focus upsell efforts.
- This data-driven approach led to stronger margins, a more efficient portfolio, and significant new sales.



THE RESULTS

\$4M+ in Upsell Revenue

Targeted customers for new systems based on data insights, resulting in \$4M+ in additional sales.

Dropped 25% of Customers

Eliminated accounts deemed too hard to service, allowing the team to focus on more profitable work.

Greater Visibility and Profitability

Real-time understanding of installation status by lake, man hours, and gross margins led to better decisions and a stronger, more profitable portfolio.



PROJECT DURATION
3 MONTHS



CUSTOMER ENGAGEMENT
5 YEARS



SERVICES DELIVERED
System Engineering | Data Systems
Process Improvement | Growth Strategy