

STORYTELLING MATTERS

CASE STUDY

The Story-Led Route to Account Expansion

The Turning Point

Shaping the Story

The Next Chapter

The Turning Point

This award-winning visual design agency had built strong relationships with its clients.

The team was trusted, talented, and highly regarded for the quality of its work. Clients valued their creativity, their thinking, and their ability to deliver beautiful, effective visual design.

But there was an opportunity the agency wasn't fully realising.

Many existing clients had more problems the agency could solve, more projects it could support, and more value it could add. But the team didn't always feel confident opening up those conversations.

They were good at serving clients. They were less comfortable selling to them.

For many team members, the idea of upselling felt awkward. It felt pushy, transactional, or somehow at odds with the trusted relationships they had worked hard to build.

The challenge was not a lack of opportunity. It was a lack of language.

The agency needed a way to help its team see account expansion differently, not as "selling more", but as continuing the story they had already started with each client.

The opportunity was to reframe upselling as a natural extension of partnership: a way to spot what clients needed next, open more strategic conversations, and help them see the bigger value the agency could bring.

Shaping the Story

I worked with the team to help them use strategic storytelling to engage existing clients more confidently in account expansion conversations.

This was not about teaching people to sell harder.

It was about helping them understand the client's story more deeply and, crucially, understand how the client could see themselves in a more positive future.

Together, we reframed upselling as a story-led conversation built around insight, relevance, and value.

The work included:

- Mapping the client journey to identify natural moments for expansion
- Reframing upsell conversations around client needs, not agency services
- Developing story-led conversation prompts to help the team open discussions with confidence
- Using “before, now, next” storytelling to connect past work to future opportunities
- Creating value narratives that showed how additional work could help clients achieve bigger goals
- Helping the team spot strategic signals in client conversations, such as growth plans, internal challenges, changing priorities, or untapped opportunities
- Building confidence through practical role-play, objection handling, and real client scenarios
- Developing simple narrative structures for follow-up emails, proposals, and expansion decks
- Creating language that felt consultative, human, and aligned with the agency's existing client relationships

The aim was to give the team a way to talk about growth that didn't feel uncomfortable or forced.

Instead of “How do we sell more to this client?”, the question became:

“What is the next chapter of this client's story, and how can we help them shape it?”

The Next Chapter

The agency's team became more confident, proactive, and strategic in the way they approached existing client relationships.

Account expansion conversations began to feel less like upselling and more like good partnership: listening closely, identifying what clients needed next, and helping them see the value of continuing the work.

The team no longer had to choose between being trusted advisors and commercial thinkers.

They had a story-led way to be both.

- A 20% increase in client expansion
- Greater confidence across the team in opening commercial conversations
- Stronger, more strategic relationships with existing clients
- A clearer framework for identifying new opportunities
- More natural, human language around growth and value
- A shift from reactive client service to proactive client partnership

What once felt like an uncomfortable upsell became something far more valuable:

a confident, consultative conversation about where the client could go next and how the agency could help them get there.