

# Propensity to Expand Framework for Customer Success

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Christian deBettencourt

# Propensity to Expand: PTE Score

The Propensity to Expand framework highlights revenue expansion opportunities using platform and customer data

- PTE Score (0-100) is composed of three weighted signal scores: Usage, Growth, and Business
- Signal scores are derived from relevant metrics, which are then percentile-ranked, weighted, and aggregated

The PTE score is used to bucket customers into High, Medium, and Low tiers, dynamically based on quartiles.

Framework can be refined (tiers, signals, metrics, weights) to improve effectiveness and align with strategy as needed.

$$\text{PTE Score} = (\text{Usage Score} \times 35\%) + (\text{Growth Score} \times 40\%) + (\text{Business Score} \times 25\%)$$

High = 66 - 100 | Medium = 33 - 65 | Low = 0 - 32

01

## Usage Signal

Represents a customer's **current** usage as a signal of active and heavy use.

Ensures that target customers are using platform at an enterprise volume.

02

## Growth Signal

Represents a customer's **trending** usage as a signal of increased adoption.

Ensures that target customers have momentum.

03

## Business Signal

Represents a customer's **business** as a signal of product fit.

Ensures that target customers are an enterprise expansion opportunity.

# Propensity to Expand: Signals and Metrics

Signal	Metric	Weight	Description
Usage (35%)	Total Traffic Last Month	40%	Number of visitors to a domain in a recent month. High traffic represents successful use of platform, GB usage, and expansion potential.
	CDN Last Month	40%	Proxy for GB usage in recent month, rather than an undefined average. CDN growth shows traction and a trend towards increased GB.
	Content Velocity Last 30 Days	20%	Content published by customer using platform to drive traffic. Higher velocity shows active use of platform and an engagement opportunity.
Growth (40%)	Traffic Growth Last 3 Months	35%	Trend of visitors over the last 3 months, signifying traction in implementing platform. Traffic growth signifies likelihood of continued growth and GB usage.
	CDN Growth Last 3 Months	35%	Trend of CDN over the last 3 months, signifying increased bandwidth use and potential for expansion in terms of GB usage.
	Product Page Growth Rate Percentage	20%	Growth rate of a domain's product page, indicating increased use of platform and potential revenue growth for customer as an expansion opportunity.
	Additional Pages Launched Last 90 Days	10%	Shows active use of platform via increased footprint and growth in product use. Not much distribution, but good indicator of recent use.
Business (25%)	Marketing Team Size Estimate	50%	Representative of potential seat licenses and users of platform. Bigger teams need more seats.
	International Traffic Percentage	50%	Representative of global footprint of customer business and increased revenue channels.

# Propensity to Expand: Data Overview

1,626 domains in initial dataset:

- Customer Success is focused on Enterprise plans, but the platform plan is **not available**
- Per [platform plans & pricing](#), Business plans start at 100GB. **239 domains meet or exceed this threshold**

Some data is not relevant:

- **Form Submissions** are excluded - these are unlimited regardless of plan
- **Page Count** is excluded - distribution is not notable, 1 domain exceeds 300 page Business plan limit
- **Avg GB per Month** is used as a filter - not scored due to redundancy, 23 domains exceed Business plan limit

Some data is missing:

- Additional data points would strengthen the framework and allow for more analysis
  - **Plan and Features** - Is this already an Enterprise customer? What features do they use?
  - **Tenure** - How long has this customer been using platform?
  - **Industry** - What industry is the customer in?
  - **Seats** - How many licenses do they have?
  - **Monthly Active Users (MAU)** - How many licenses are being actively used each month?
  - **Net Promoter Score (NPS)** - Is customer sentiment trending in the right direction?
  - **Monthly and Annual Recurring Revenue (MRR, ARR)** - How much is the customer spending?

# Customer Success Operationalization

1	<b>PTE Score + Tier</b>	Customer PTE scores and tiers are automatically calculated every week to ensure quick insights and outreach
2	<b>CRM/BI Reporting</b>	Scores and tiers are automatically input into CRM and BI tooling coupled with alerts (Slack/AI) so CS can take action
3	<b>CS Playbook</b>	High: Schedule expansion call   Medium: Upsell during regular cadence   Low: Monitor for churn/retention
4	<b>Refine</b>	CS flags expansion outcomes in CRM, PTE Framework is reviewed and refined each quarter to improve win rates

Customer Success — Propensity to Expand						
239 accounts · refreshed weekly						
Filter	All	High	Med	Low		
# ▼	DOMAIN	TIER	SCORE	USAGE SIGNAL	GROWTH SIGNAL	BUSINESS SIGNAL
1	Domain 289	● High	79.1	<div style="width: 79.2%;"><div style="width: 79.2%;"></div></div> 79.2	<div style="width: 83.7%;"><div style="width: 83.7%;"></div></div> 83.7	<div style="width: 71.5%;"><div style="width: 71.5%;"></div></div> 71.5
2	Domain 1370	● High	78.4	<div style="width: 63.0%;"><div style="width: 63.0%;"></div></div> 63.0	<div style="width: 92.9%;"><div style="width: 92.9%;"></div></div> 92.9	<div style="width: 77.0%;"><div style="width: 77.0%;"></div></div> 77.0
119	Domain 329	● Med	55.1	<div style="width: 86.2%;"><div style="width: 86.2%;"></div></div> 86.2	<div style="width: 27.8%;"><div style="width: 27.8%;"></div></div> 27.8	<div style="width: 54.0%;"><div style="width: 54.0%;"></div></div> 54.0
120	Domain 649	● Med	54.8	<div style="width: 52.7%;"><div style="width: 52.7%;"></div></div> 52.7	<div style="width: 37.2%;"><div style="width: 37.2%;"></div></div> 37.2	<div style="width: 34.5%;"><div style="width: 34.5%;"></div></div> 34.5
238	Domain 239	● Low	26.1	<div style="width: 39.6%;"><div style="width: 39.6%;"></div></div> 39.6	<div style="width: 13.1%;"><div style="width: 13.1%;"></div></div> 13.1	<div style="width: 28.0%;"><div style="width: 28.0%;"></div></div> 28.0
239	Domain 845	● Low	14.5	<div style="width: 12.2%;"><div style="width: 12.2%;"></div></div> 12.2	<div style="width: 19.2%;"><div style="width: 19.2%;"></div></div> 19.2	<div style="width: 10.0%;"><div style="width: 10.0%;"></div></div> 10.0

### Propensity to Expand — Breakdown

**Domain 1165**  
Rank 31 of 239  
High

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## 66.4

PTE SCORE

0 25 50 75 100

Usage signal wt. 35% 63.4

Growth signal wt. 40% 71.6

Business signal wt. 25% 62.5

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Traffic	<b>341K</b>	CDN	<b>794 GB</b>
Traffic trend	<b>+26%</b>	CDN trend	<b>+72%</b>
Content velocity	<b>21/mo</b>	Prod. page growth	<b>13%</b>
Pages added	<b>4</b>	Team size	<b>17</b>
Intl. traffic	<b>56%</b>		