ASSET-LED SALES BLUEPRINT

Turn IT Asset Data Into Predictable Revenue

1. The Problem—and the Shift

70% of your customer deals go unquoted—not because you're not a great sales organization, but because you don't have full visibility into what your customers own or need. Your team is quoting reactively, chasing renewals too late, and missing refreshes entirely.

It's not because they aren't working hard.
It's because they don't have a system.

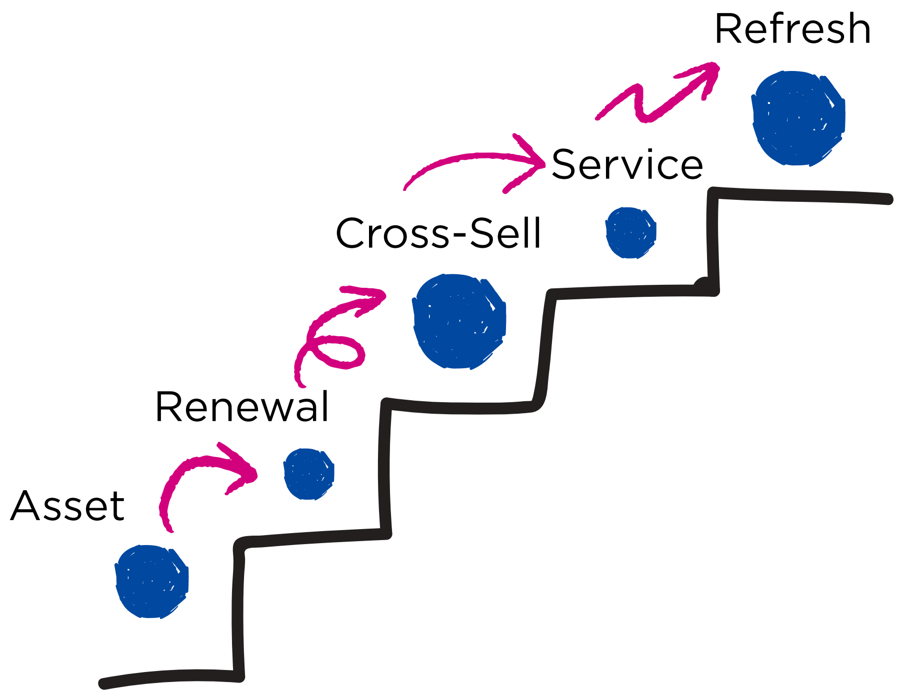
What's Missing

- A full view of the customer's install base (not just what you sold)
- Triggers to spot renewals, risk, or refresh needs early
- A playbook to align sales, renewals, and success around lifecycle revenue

Are you only seeing the tip of the iceberg?

Without this, you're stuck responding to requests instead of driving the conversation.

The Shift: Asset-Led Sales
Asset-Led Sales is a repeatable motion that starts with the customer's install base—hardware, software, licenses, support—and uses it to surface opportunities **before the customer asks.**



Steps to more revenue from every asset

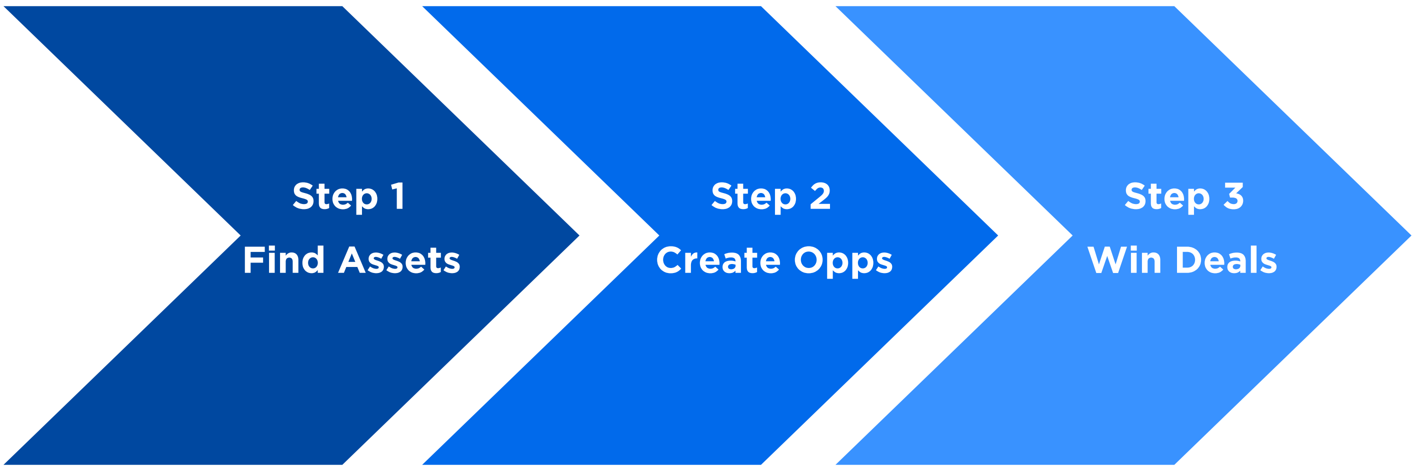
Why It Matters Now

- Margins are shrinking
- Customers are better informed
- Cold outreach is harder than ever
- Renewal and refresh cycles are where the profit lives
- You need a strategy to grow existing accounts predictably

What It Unlocks

- Predictable gross margin - often $200K to $1.5MM per rep
- Faster rep ramp and smarter outreach
- Cleaner, more actionable pipeline
- Higher prices for proactive value
- Strategic positioning with your customers

The asset-led sales framework



Asset-Led Sales is a simple, repeatable system built on three steps. Each step addresses a core problem that keeps revenue stuck.

Step 1 - Find The Assets

Problem

You don't have full visibility into what your customers own.

What to do:

- Pull asset data from OEMs, distributors, RMMs, legacy quotes, and spreadsheets
- Centralize install base across hardware, software, licenses, and support
- Identify gaps: what's covered, what's missing, what's at risk

Your install base becomes your most valuable sales dataset.

Step 2 - Create The Opportunities

Problem

You're missing triggers that should start conversations.

What to look for:

- End-of-life or end-of-support dates (EOL, EOS, EOSL)
- Lapsed or auto-renewing support contracts
- Aged assets (>5 years)
- Orphaned assets, duplicated SKUs
- ESG and budget triggers (e.g., power usage, old OS, CVEs)

Group and prioritize opportunities by renewal, refresh, upsell, or service motion.

Step 3 - Win The Deals

Problem

Insights aren't translating into action or revenue.

What to build:

- Bundled quotes tied to real problems—not just SKUs
- Pre-packaged renewals and refresh offers
- Proactive outreach emails that show what's coming and why it matters
- A portal where reps and customers can collaborate in real-time

You go from waiting for deals to designing and winning them.

Why This Works

This isn't about replacing your CRM or CPQ.

It's about giving your team a way to:

- Spot revenue before it shows up in a pipeline align sales, renewals, and ops on shared signals
- Sell more—at higher margin—with less guesswork

Want to See It in Action?

We can run a free ROI on your existing accounts to show what you're missing—and how much it's worth.

Reach out to sales@owlytica.com to schedule a 1-1 consultation.

ASSET-LED SALES BLUEPRINT FULL BRIEF

Turn IT Asset Data Into Predictable Revenue

Section 1: The Problem

You Can't Sell What You Can't See

You know there's money on the table—in renewals, refreshes, services, subscriptions.

But… you can't act on it because you don't have a full picture of what your customers actually own, what's coming due, what's at risk, or what's missing.

And worse: there's no system or strategy to fix that.

The Real Frustration

You're running a strong business with solid customers and experienced reps. But every week, you hear something like:

- "We missed the renewal—again."
- "Didn't know they replaced that switch last year."
- "Wait, we still support that? I didn't even know we sold it."

What's Missing

- A full view of the customer's install base (not just what you sold)
- Triggers to spot renewals, risk, or refresh needs early
- A playbook to align sales, renewals, and success around lifecycle revenue

This isn't about quoting.
It's about visibility.

And until you fix that, every other process—renewals, expansion, account planning—is compromised.

You Can't Sell What You Can't See

Reid Smith - Vaniz Founder of Owlytica

What's Really Going Wrong

- **You don't know what the customer has.**

  Assets are spread across quotes, spreadsheets, emails, and portals—but no one has the full picture.

- **You don't know what the customer needs.**

  Are they using what they bought? Is it out of date? Do they have renewals coming? Are they overpaying?

- **You don't have a strategy to align your team around the lifecycle.**

  Sales sell what they can see. Renewals work off old spreadsheets. Customer success doesn't know what's current or expired. Everyone's guessing.

- **Your data isn't helping.**

  What should be your competitive edge is just noise. Disconnected, incomplete, and stale.

The Cost of Inaction

- You miss revenue on assets you didn’t sell, but could refresh, service or renew
- You renew things that should be refreshed (or vice versa)
- You fight fires instead of surfacing opportunities
- You lose trust and margin because you don’t sound like the expert

You’re not just leaving money on the table.

You’re leaving your strategy on the table.

And the longer you wait, the harder it gets to catch up.

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Hidden Revenue Report

Input / Assumption	Input	Output	Description
Total Accounts	230		Number of customer accounts you're evaluating.
Average Assets per Account	1000		Estimated number of IT assets each account has (hardware, licenses, support, etc.).
Total Asset Across All Accounts		230,000	Total number of assets across all accounts (accounts × assets per account).
Current Asset Visibility (%)	0%		What % of those assets you have clean, usable data on today.
Assets With No Visibility		230,000	Assets you likely manage but don't have data for—no serial number, location, or renewal info.
Assets Near Renewal/EOSL (%)	30%		What % of assets are near contract expiration or End-of-Support (EOL/EOSL).
Assets Near Renewal/EOSL (#)		69,000	Total number of assets approaching renewal or end-of-support, based on the % above.
Assets Ready for Refresh/Upsell (%)	30%		What % of assets are outdated, underused, or a candidate for a better-fit product or service.
Assets Ready for Refresh/Upsell (#)		69,000	Total number of assets ready for refresh or upsell.
Total Assets Ready for Renewal/Refresh		138,000	Combined total of all expiring or outdated assets across the business.
Assets You Can Actually Sell Against	50%		What % of the total assets match your product/service offering (ignore assets outside your scope).
How Much of Their Business You Have Today	20%		What % of their total IT spend you currently capture—your wallet share.
# of Assets You Can Actually Sell/Support		55,200	The number of assets that align with what you offer and can actually sell or support.
% of Quoted Deals You Expect to Win	25%		Your average close rate when you quote deals
Expected Wins Based on Quote Rate		13800	This is how many assets will likely close based on your average win rate.
Average Margin per Won Deal (Asset)	$400		How much profit you make on each asset that closes (after costs).
Expected Margin from Closed Deals		$5,520,000	Shows how much margin you could generate if you ran this model across all your customer accounts
Estimated Margin from 10 Accounts		$240,000	Shows how much margin you could generate if you ran this same model across just 10 customer acc

* Bonus does not include 10% margin increases by quoting renewal proactively
* Bonus does not include additional services that can be sold against exposed assets

Unlock Hidden Margin with the Hidden Revenue Report

This simple Google sheet helps you quantify the margin you're likely leaving on the table—using your own customer data, often in excess of $1MM in gross margin.

In this step-by-step walkthrough, we show you how to:

- Identify the assets across your accounts that are nearing renewal, end-of-support, or ready for refresh
- Estimate how much business you're missing today due to low visibility or low wallet share
- Run 3 scenarios to project margin gains based on your quoting and win rates

Watch the video guide

Hidden Revenue Report Walkthrough
https://vimeo.com/1085704742?share=copy

Make a copy of the Google Sheet to try it yourself:

Access the Hidden Revenue Report
https://docs.google.com/spreadsheets/d/1zVNnw-5tMTMSJv1T-Q_DKfHPQe8dOuAhSXypBs-BUP4/edit?gid=1167273094#gid=1167273094

What You'll Learn

This isn't about replacing your CRM or CPQ.

It's about giving your team a way to:

- Uncover how poor asset visibility eats into your margin
- Estimate the real upsell and renewal potential from assets you've already sold
- Quote more consistently using lifecycle triggers to 2–3X your renewal revenue

To try it yourself:

File → Make a Copy and plug in your own assumptions to see your potential gains

Want help building your version?

We're happy to walk you through it 1-on-1 using your data, email **sales@owlytica.com** with subject line "hidden revenue" to speak with a revenue expert.

Section 2: What Is Asset-Led Sales?

Finally, a Strategy That Turns Customer Assets Into Sales Opportunities

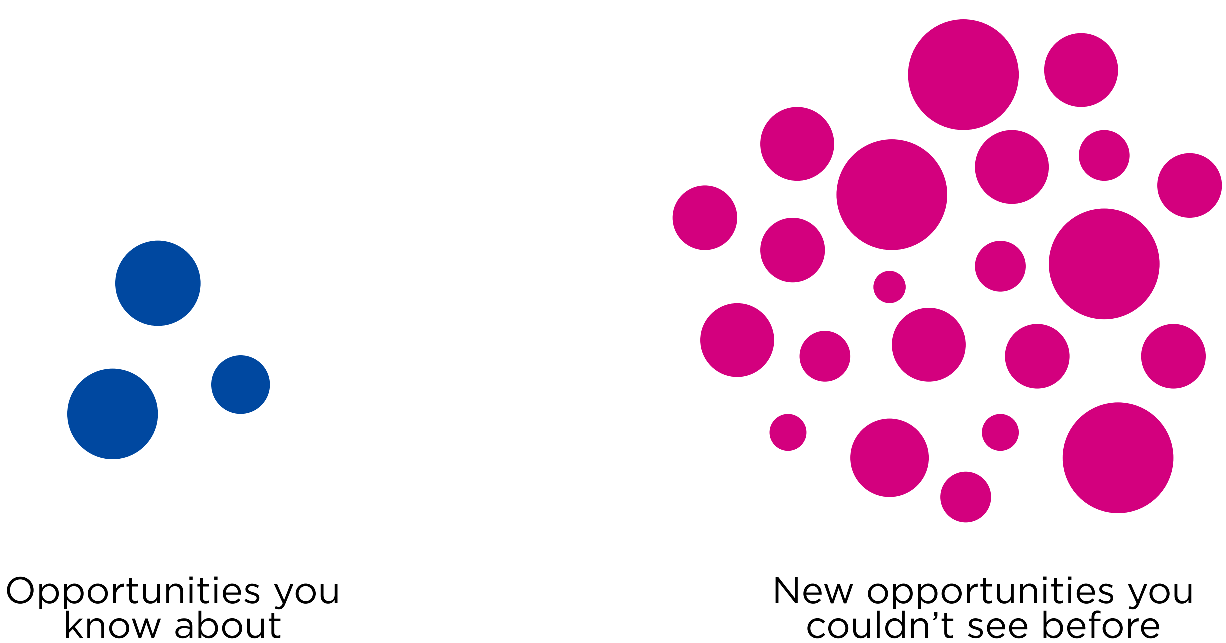
Asset-Led Sales is a simple but powerful shift in approach.

Instead of building your pipeline around what you want to sell, you build it around what your customer already has—hardware, software, licenses, support contracts—and what's coming next in their lifecycle.

You use that asset data to surface renewals, refreshes, upsells, and service opportunities before the customer ever asks.

This isn't just a quoting tactic. It's a full go-to-market strategy that aligns sales, renewals, and operations around **what the customer owns, what they need, and how to act on it.**

See the full picture, sell the whole account



The Core Idea

You don’t need to guess what to sell.

Your customers are already telling you—through their assets, their contract dates, their usage patterns, and their risk profile.

If you can see it, you can sell it.

If you can’t, you’re stuck..

How It’s Different From Traditional Tools

Most teams rely on a patchwork of CRMs, CPQs, spreadsheets, OEM portals, and gut instinct.

But those tools weren’t built to surface asset-based opportunities or guide lifecycle decisions.

Traditional Model	Asset-Led Sales
CRM tracks activity	Asset-Led tracks ownership and lifecycle
CPQ responds to requests	Asset-Led drives proactive quotes
Quoting is isolated	Sales, renewals, and CS are aligned
Data is disconnected	Data is centralized and actionable

What It Covers

Asset-Led Sales works across the entire portfolio:

- Hardware: switches, servers, endpoints, access points
- Software: licenses, agents, subscriptions
- Support: OEM maintenance, warranties, add-ons
- Services: installs, assessments, upgrades

If it has a lifecycle, it has revenue potential.

This is how you go from chasing renewals to designing roadmaps.

From quoting SKUs to solving problems.

From being replaceable to being strategic.

How Is This Different From CPQ, CRM, and Traditional Approaches?

- **CPQ tools have a strength: they generate quotes quickly.**

  But they only work when someone knows what to quote. They're built to respond, not to discover. If the rep doesn't know a renewal is coming—or that an asset is risky—nothing gets quoted.

- **CRM tools are great at tracking activities and deals.**

  But they rarely show what the customer actually owns. The install base is usually missing or out of date. You end up with a log of what happened, not a system for what should happen next.

- **Spreadsheets and portals fill in the gaps.**

  But they're manual, scattered, and hard to keep clean. There's no consistent way to turn all that data into action.

Asset-Led Sales doesn't replace CPQ or CRM—it gives them purpose.

It brings together the data you already have (and some you don't) to answer a bigger question:

> **Key Question What should we be talk to this customer about right now?**

Instead of hoping the right opportunity shows up in a quote request or pipeline review, Asset-Led Sales puts you in control of the conversation.

Section 3: The Framework

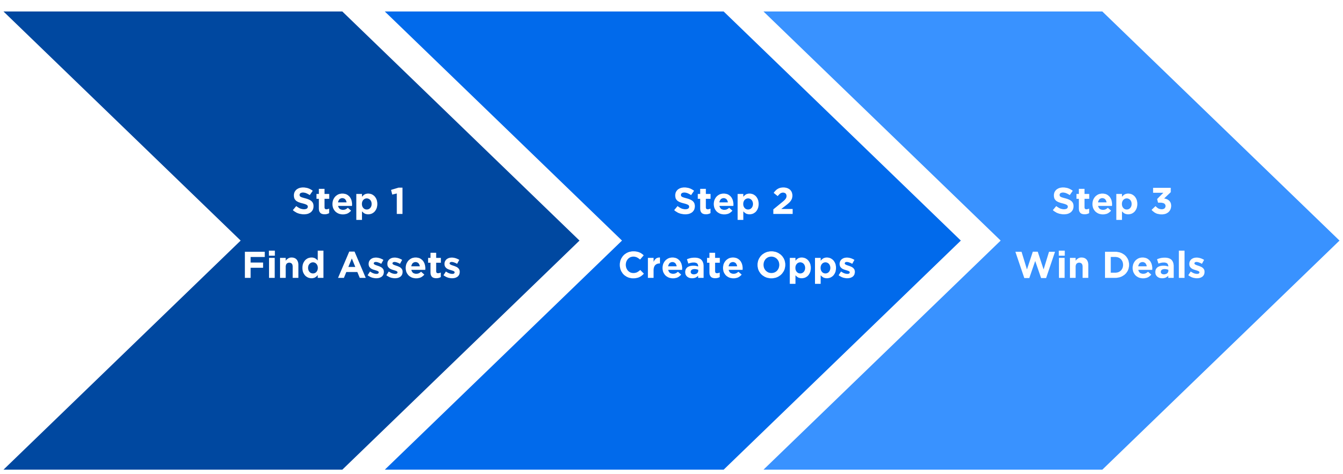
How to Operationalize Asset-Led Sales

Asset-Led Sales happens in three steps.

Each step solves a specific bottleneck: what the customer owns, what they need, and what to do next.

You use that asset data to surface renewals, refreshes, upsells, and service opportunities before the customer ever asks.

This isn't just a quoting tactic. It's a full go-to-market strategy that aligns sales, renewals, and operations around **what the customer owns, what they need, and how to act on it.**



Step 1: Discover the Assets

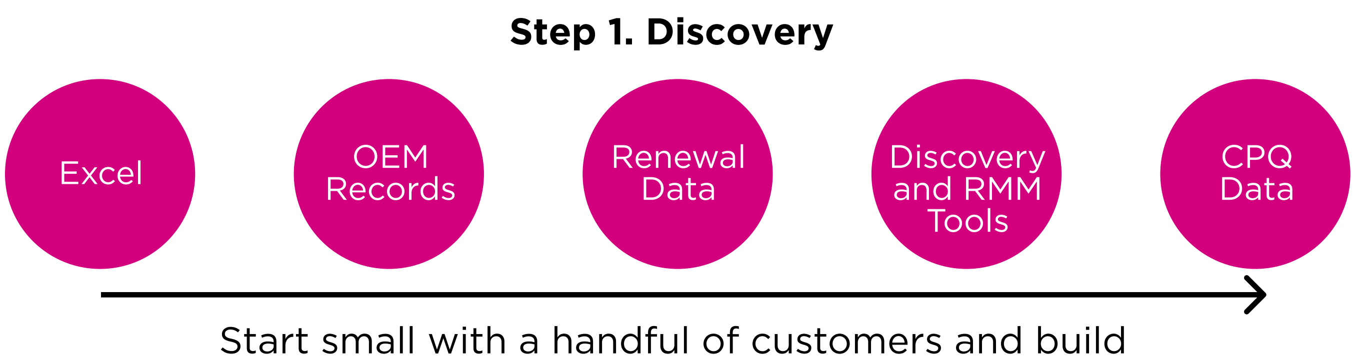
You can't take action on what you can't see.

The first move is creating a clean, centralized view of the customer's install base. Not just what you sold, but everything they own across OEMs, contract types, and sources.

What counts as an asset?

Any hardware, license, subscription, support contract, or service with a lifecycle.

Where the data lives:



- Distributor exports
- OEM portals
- RMM tools
- Old quotes
- Customer spreadsheets
- Support and maintenance contracts

Step 2: Surface the Opportunities

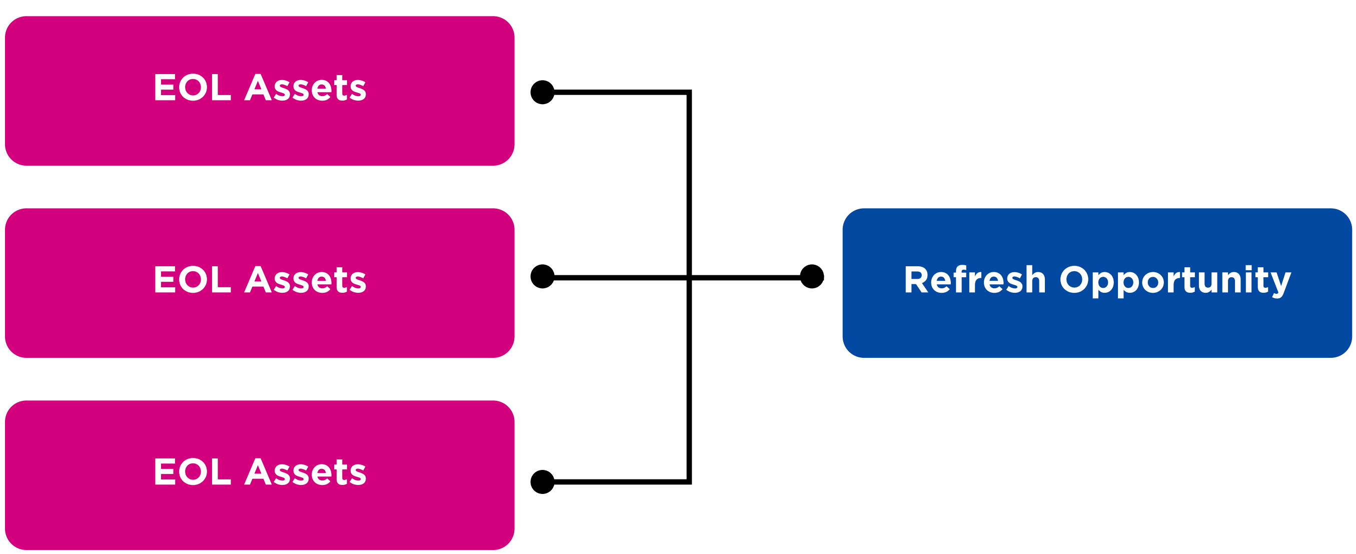
Visibility means nothing without action.

Once you've built the asset inventory, the next step is identifying which items signal a need and grouping them by sales motion.

Common triggers to look for:

- End of Life (EOL) / End of Support (EOS/EOSL)
- Upcoming or auto-renewing support contracts
- Aged gear (5+ years in service)
- Lapsed or missing coverage
- Underutilized or duplicate SKUs
- OEM preference changes or incentives
- CVEs, outdated firmware, or risk-based issues
- ESG flags: energy consumption, old OS, etc.

Step 2. Surface Opportunities



Group and Prioritize by

- Risk to the customer (operational or security)
- Budget alignment
- Sales motion (renewal, refresh, upsell, service)
- Lapsed or missing coverage
- Underutilized or duplicate SKUs
- OEM preference changes or incentives
- CVEs, outdated firmware, or risk-based issues
- ESG flags: energy consumption, old OS, etc.

Step 3: Drive Predictable Revenue

Turn the insights into conversations—and the conversations into deals.

Now that you know what to act on, make it easy for your team to quote it, pitch it, and track it. This is where most systems break down, because the data never connects to the sales motion.

What to build:

- Grouped, problem-first quotes (e.g,. "Secure Refresh Bundle," "Cloud-Ready Core Package")
- Pre-packaged renewals that remove friction
- Proactive emails that say, "We noticed this" instead of "Do you need anything?"
- Portals that let reps and customers view and interact with upcoming needs
- Follow-ups and dashboards that track actions, not just activity

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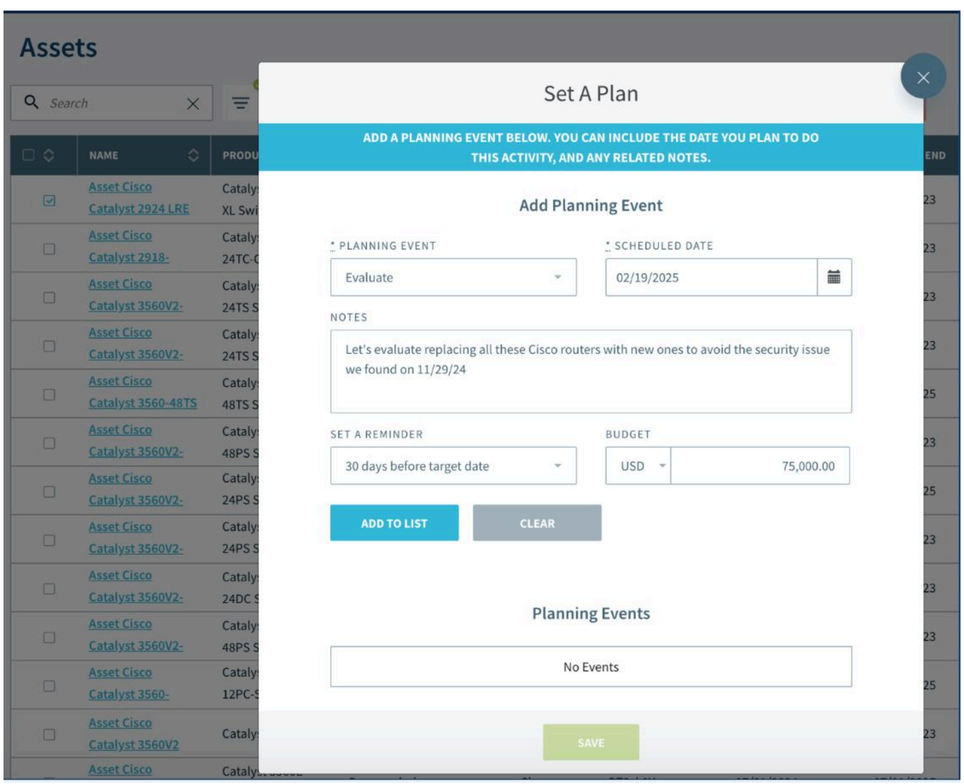
- Follow-ups and dashboards that track actions, not just activity

Step 3. Drive Revenue

Aug 18, 2025 **$185,000** Refresh	Aug 27, 2025 **$75,000** Renewal	Sep 23, 2025 **$73,000** Upgrade
Dec 17, 2025 **$35,000** Renewal	Feb 5, 2026 **$67,000** Upgrade	May 23, 2026 **$185,000** Refresh



Visual of Owlytica grouping assets together to create proactive sales opportunities

The outcome:

You don’t just quote faster—you quote smarter.

You don’t just track deals—you create them.

And over time, your team builds a predictable revenue engine powered by data that most VARs ignore.

Section 4: Tools for Sales Teams

What Your Team Needs to Execute Asset-Led Sales

Even the best strategy fails without enablement. Sales teams need tools that are fast to use, easy to personalize, and built around how they actually sell.

This section outlines what to give them—and how to make it stick.

> Pro Tip: Owlytica offers Do It For You services to make all steps easy and automated

Discovery Prompts & Call Frameworks

Help reps lead better conversations—not just respond to "Do you have a quote?"

- "How are you tracking all your renewals and auto-renewals?"
- "Do you know which of your assets are up for renewal in the next 6 months?"
- "Would it be helpful if we showed you what's aging or EOL?"

Use case: First call with a customer who hasn't seen a full asset report yet

Format: PDF cheat sheet or inline CRM prompt

Grouped Sales Plays

Make it easy to pitch more than one path forward—and align quotes to problems, not SKUs.

- Option 1: Simple Renewal (status quo)
- Option 2: Lifecycle Refresh (fix risk, update assets)
- Option 3: Future-Proof Package (refresh + new services)

Use case: Renewal coming due or account expansion opportunity

Format: Simple sales plays PDFs and videos that are easy to understand.

Email Templates

Stop sending "Just checking in" emails. Start sending value.

- Renewal reminder with context
- Refresh prompt with asset triggers
- Service opportunity tied to budget cycle
- "We noticed this in your install base" campaign

Use case: Automated outreach or rep follow-up

Format: Google Doc, CRM sequences, or Owlytica triggers

Portal Experience & Collaboration Tools

Let customers see grouped assets, approve quotes, and track next steps—all in one place.

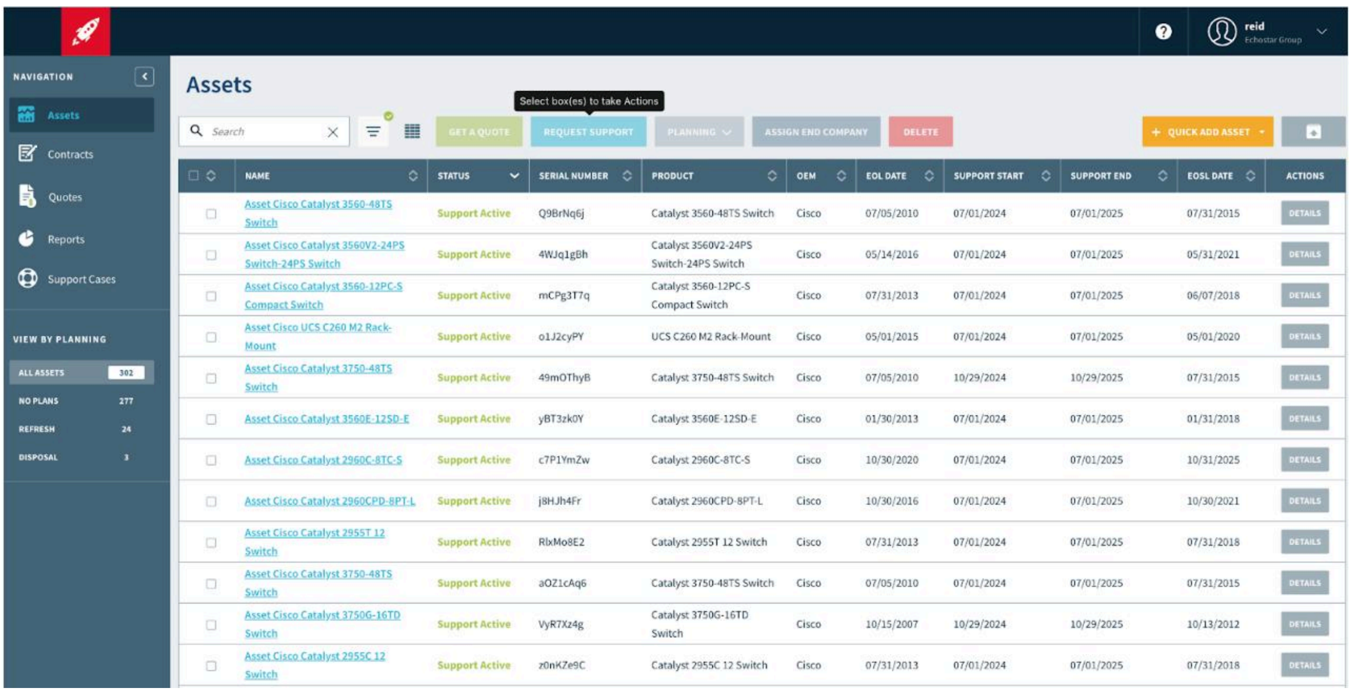
- Renewal reminder with context

Key features to showcase:

- Asset-by-asset visibility
- Grouped renewal or refresh views
- Real-time commenting or quote approvals
- Summary dashboards for busy stakeholders

Use case: Key accounts, procurement teams, and budget planning

Format: Interactive demo portal or annotated screenshots



Objection Handling Playbook

Top 5 Objections About Data, Discovery, and Asset Tracking

1. "I'm not comfortable giving you access to our asset data."

Response:

"I get it—data ownership is a big deal. That's why everything stays visible and exportable by you. We're not locking you in—we're helping you see what you already own, so you stay in control."

2. "We don't want a discovery tool running in our environment."

Response:

"Totally fair. In many cases, we work with the asset lists you already have—from your distributors, RMM tools, or purchase records. Discovery is optional, and we can show value without installing anything."

3. "Isn't this just a way for you to sell us more stuff?"

Response:

"It's not about selling—it's about surfacing what's at risk or being underutilized. Yes, it might lead to renewals or upgrades, but only where it makes sense based on your data."

4. "We already track assets in Excel or our internal system."

Response:

"Good—you're ahead of most. We're not replacing your system—we're enhancing visibility across sites, contracts, and lifecycles so your team doesn't have to chase down five spreadsheets every quarter."

5. “Why would we store our assets with a vendor?”

Response:

“Because it saves time, increases leverage, and reduces risk. You still own the data—we’re just helping you turn it into insight. And if you ever want to export or walk away, you can.”

Use case: Sales onboarding, renewal training, objection scripts

Format: One-pager or sales enablement slide

The key is consistency.

When everyone on the team is using the same tools, language, and playbook, you move faster, win more, and look like the strategic partner your customers expect.

Section 5: What to Track

Metrics That Show It's Working

Asset-Led Sales isn't just about better quotes—it's about building a system that improves over time.

To prove that it's working (and spot where it's not), track metrics tied to visibility, action, and revenue.

Visibility Metrics

- Accounts Loaded – How many customers have install base data in your system?
- Assets Added – How complete is that install base across OEMs and sources?
- Tracked vs Quoted Assets – Are you actually quoting against the full asset base?

Sales Motion Metrics

- Grouped Quotes Sent – Are reps using the bundles, not just quoting one-offs?
- Renewal & Refresh Pipeline – What's scheduled for the next 30/60/90 days?
- Closed-Won Deals (Asset-Led) – What's converting that wasn't in your CRM before?

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Impact Metrics

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Impact Metrics

- Margin per Quote – Are you improving profitability?
- Wallet Share per Account – Are you growing revenue from customers you already have?
- Rep Adoption & Usage – Are the people using the system seeing better results?

Pro Tip: Set a baseline now—even if your data isn't perfect—so you can measure the shift.

Section 6: How to Roll It Out

Start Simple. Scale Fast. Don't Overbuild.

You don't need to boil the ocean to get results. The smartest rollouts start with a single region, rep, or customer, and grow from there.

Phase 1: Crawl

Start manually with spreadsheets or Airtable.

- Pull a few install bases from OEMs/distributors
- Identify 2-3 renewal or refresh triggers
- Create grouped quotes by hand
- Use email + Loom or Teams to share with customers
- Track results in a simple dashboard

Goal: Prove that asset-led motions create better conversations and close more business.

Phase 2: Walk

Use a tool like Owlytica to automate what's working.

- Upload install base data from multiple sources
- Auto-tag triggers like EOL, aged assets, lapsed support
- Build quote templates and email sequences
- Launch a simple customer portal experience

Goal: Make it easier to do the right thing every time—and replicate across accounts.

Phase 3: Run

Integrate into core workflows.

- Trigger alerts and grouped quotes automatically
- Assign follow-ups and track rep usage
- Review dashboards weekly to guide team behavior
- Expand portal access across strategic customers

Goal: Turn asset data into a repeatable revenue engine across your business.

Who's Involved

- Sales drives the conversations
- Sales Ops owns the system
- Customer Success brings insight
- Executive Sponsor clears the path
- Owlytica can run the heavy lifting or work alongside your team

Common Pitfalls to Avoid

- No clear owner – Everyone touches it, but no one drives it
- Inaccurate or stale data – Garbage in = zero trust
- Overcomplication – You don't need 100 triggers to get started
- Lack of sales enablement – If reps don't know what to say, they won't say anything

Why It's Worth It—and What to Do Next

Most teams spend years reacting to what customers ask for—chasing quotes, missing renewals, and guessing at what to sell next.

Asset-Led Sales flips that on its head.

It gives you:

- Visibility into the full install base—what's at risk, what's aging, what's coming up
- Control over renewals, refreshes, and upsells—before your competitors see them
- Confidence that your team is quoting smarter, growing margin, and becoming indispensable to your customers

And the best part? You don't have to rip and replace anything.

> You can start small—with one rep, one region, or one customer—and scale what works.

Your Next Step

If you want to:

- Grow account revenue without chasing net-new logos
- Turn disjointed data into predictable margin
- Equip your team with a repeatable, proven playbook

Then the next move is simple:

Run your first Asset-Led Sales motion.

We've built the tools, templates, and workflows to help you do it.

To discuss asset-led sales and how to apply it to your business, email **sales@owlytica.com** we can discuss your business, your data and sales plays to unlock the hidden margin in your customer, renewal and asset data.