

Launch Portfolio Monetization Without Disrupting Your Business

Ease cross-product sales across all of your offerings - software, hardware, and services. Here's a Crawl-Walk-Run approach to implement Portfolio Monetization smoothly.

Crawl Build Momentum With Quick Wins

Offer simple bundles to create immediate value for customers, drive fast revenue uplift, gain insights into product demand, and provide a low-risk way for your sales team to practice selling across the portfolio.

Key Actions



- Create simple, easily consumable product bundles
- Actively promote cross-selling and offer discounts for multi-product packages
- Bundle services with core products to add value and drive adoption

What to Watch for



- Discounting without strategic packaging can erode profit margins
- Bundling products that are not yet fully interoperable may create friction
- Relying solely on discounts for differentiation

Walk Establish Clear Bundles and Value Propositions

Tailor each product suite's value proposition to clearly align with each customer segment's needs to differentiate you in the marketplace. Drive adoption with your marketing and customer successes teams.

Key Actions



- Combine multiple product offerings into cohesive integrated product suites
- Clearly define the value proposition, use cases, and ideal customer profile
- Align marketing, sales, and customer success teams to drive adoption of the suites

What to Watch for



- Confusing value messaging that lacks a "better together" story
- Insufficient sales enablement and customer education on the product suites
- Tracking the right metrics to incentivize and measure success

Run Integrate Flexibility into Portfolio Execution

Deliver a seamless customer experience through flexible consumption opportunities, consistent operations, and intuitive design—while aligning internal systems and teams to support ongoing Portfolio Monetization.

Key Actions



- Execute flexible consumption models
- Ensure seamless product interoperability and customer experience
- Optimize reporting, revenue attribution, and sales compensation
- Align top-down personnel on Portfolio Monetization strategy and vision

What to Watch for



- Executive misalignment and challenges with cross-functional coordination
- Complexity in pricing, packaging, and operational execution
- The need for significant changes to the business model and technical architecture

To help you plan your Portfolio Monetization strategy, we compiled a comprehensive checklist, based on our 30+ years of expertise.



Portfolio Monetization Checklist

Strategy & Planning

- Define clear goals for Portfolio Monetization (e.g., revenue growth, retention, market expansion)
- Understand your ideal customer profiles (ICPs) at both the product and portfolio levels
- Articulate a compelling “better together” value proposition
- Map your current phase (Crawl, Walk, Run) and define next steps
- Determine success metrics at both product and portfolio levels
- Ensure executive alignment and cross-functional ownership of the strategy

Packaging & Pricing

- Select a packaging model that fits our portfolio (e.g., tiered, base + add-on)
- Determine a simple, scalable pricing model that aligns with our customer’s perceived value
- Evaluate hybrid or usage-based pricing models for flexibility

Go-to-Market Alignment

- Align sales, marketing, and customer success teams on messaging and execution
- Produce enablement materials that support consultative, portfolio-level selling
- Structure sales incentives to promote cross-selling and upselling

Operational & Technical Readiness

- Ensure systems support flexible packaging, pricing, and licensing models
- Choose an entitlement management system or equivalent to bridge commercial and delivery systems
- Minimize SKU sprawl and operational complexity

Customer Experience

- Streamline the purchasing and onboarding process across the portfolio
- Offer a self-service portal for entitlement visibility and management
- Capture and leverage engagement data to inform expansion and retention strategies

Learn more about how to make cross-product sales seamless with Portfolio Monetization. Get the Thales/Simon Kucher guide, *The Future of Revenue Growth with Your Existing Products - Portfolio Monetization* or schedule a **free consultation** to find out how to leverage Sentinel EMS to offer all products and services under one agreement.

Get the Guide

Talk with an Expert