

ECOMMERCE PLAYBOOK

Upsell Playbook

Every store knows which products go together. Almost none of them act on it at the right moment — the recommendation arrives at checkout, when the customer has already decided, or in a batch email, when it has nothing to do with what they bought.

At a glance	
Trigger	Purchase of a specific product or category
Goal	Increase customer value
Primary KPI	Cross-sell revenue
Messages	1–2
Setup time	Under 25 minutes

What is automated cross-sell on WhatsApp?

Automated cross-sell waits a defined period after a purchase, checks what the customer already owns, and recommends a genuinely complementary product in a conversation they can reply to. Timing is drawn from the product's usage cycle rather than a fixed marketing calendar.

Key takeaways

- Recommend after the product has been used, not on the day it arrives.
- Suppress anything the customer already owns — the fastest way to look automated.
- One recommendation converts better than a list of five.
- A reply asking 'will this fit mine' is the conversion, not an objection.

Why this leaks revenue today

1. The recommendation arrives too early

An accessory pitched the day the parcel lands reads as a sales push. The customer has not used the product yet.

2. It recommends things they already own

Nothing signals 'automated and careless' faster than being sold the thing sitting in your last order.

3. There is no way to ask a question

Most cross-sell hesitation is compatibility — will it fit, will it work with mine. A one-way email cannot answer that.

Entry conditions

The journey only starts when all of these are true. Entry conditions matter more than message copy — most underperforming journeys are mistargeted, not badly written.

- Purchase of a specific product
- Product used for 14+ days
- Complementary item not owned
- Positive satisfaction signal

What has to be connected

Order history	Everything the customer already owns, so you never re-recommend it
Product relationships	Which items genuinely complement which — curated, not just co-purchased
Usage cycle	How long before the complementary product becomes relevant
Compatibility rules	Which variants, sizes and models actually work together

The journey

Order placed → Wait 14 days → Owns product X, not Y → Recommend one item

Then it branches on what the customer does:

Asks about compatibility	AI answers from product data
Adds to order	Prefilled checkout link
Not interested	Suppress this recommendation for 90 days

Goal: Second order placed — journey stops

A journey without a stop condition is a journey that gets your number blocked. Set the goal event before you write a single message.

The messages

Starting points, not scripts. Rewrite them in your own voice — and note the reasoning, because that is what transfers to your catalogue.

Day 14

Now you've had the {product} a couple of weeks — most people pair it with {complement}. Want the details?

Why: Waits until the product is in use, and frames the recommendation as what other owners do rather than what you want to sell.

On question

Yes, it fits the {model} you have. Here it is, and it ships with the same delivery.

Why: Answers the compatibility question directly using the customer's own order data. That is the conversion.

What it looks like to the customer

Now you've had the grinder a couple of weeks — most people pair it with a tamper and mat set. Want the details?

Will it fit the 58mm basket?

Yes — the set is 58.5mm, sized for exactly that basket. It's the one we ship with your machine model.

Add it

Done. Here's a checkout link with it added, same delivery address.

Illustrative conversation. Not a customer transcript.

What to measure

Metric	Definition
Cross-sell revenue	Revenue from second orders attributed to the journey.
Attachment rate	Customers who add the recommended item.
Average order value change	Whether customer value actually moved, not just whether orders happened.
Opt-out rate	The guardrail. Cross-sell is where over-messaging shows up first.

Keeping the numbers honest. Agree the attribution window before launch. Report direct and influenced conversions separately. Where volume allows, hold out a control group. Do not claim every order that happens after a message.

Set it up

1. Map genuine product relationships

Curate the pairs. Co-purchase data alone will recommend nonsense.

2. Set the delay from usage, not sales

Fourteen days is a starting point. Match it to when the complement becomes relevant.

3. Build the ownership suppression

Never recommend something in the customer's order history.

4. Write one recommendation

One item, one reason, one question. Lists convert worse.

5. Cap the frequency

One cross-sell message per customer per quarter is a sensible ceiling.

Then tune it

Move the delay before you change the product

Underperforming cross-sell is usually mistimed rather than mismatched.

Test one item against three

One recommendation with a reason typically beats a carousel of options.

Watch opt-outs, not just revenue

A cross-sell journey that lifts revenue while burning your contactable list is losing money.

Questions this raises

When is the right moment to cross-sell?

After the customer has used the product long enough to understand it. For most categories that is one to three weeks, not the day of delivery.

How is this different from a recommendation email?

The customer can ask 'will this fit mine' and get an accurate answer from their own order data, in the same thread, immediately. That question is where most cross-sell dies.

Won't this annoy customers?

It will if it is frequent, generic or early. One well-timed, well-matched recommendation per quarter is a very different experience from a weekly product email.

How do I stop recommending things they already own?

Ownership suppression against order history is set up before launch. It is the single most important rule in this journey.

Does upsell work for one-off purchases?

Less well. This journey earns its place in catalogues with genuine accessories, consumables or complementary ranges.

Should I discount the cross-sell?

Usually not. If the recommendation is right and the timing is right, a discount adds cost without adding conversion.

Want this built with you?

ConvoHut is working with a small group of early access customers. We configure the first journey together, review it weekly, and agree the success metric before anything goes live. convohut.com/early-access

ConvoHut is pre-launch. This playbook contains no customer results, and any interface figures shown on our website are sample data. Version 1.0, August 2026.