



SaaStr AI ANNUAL ✨ ✨



\$1M in Expansion Revenue Was Hiding in Our Unstructured Data. An AI Agent Found It



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Founder
HappyFox

happyfox Bootstrapped. Profitable. Zero Funding.

AI first Support Platform that actually works for the entire organization.

| | | | |
|---------------------|----------------------|----------------------------|----------------------------|
| \$20M ARR | \$0 Raised | 2,200+ Customers | <100 Employee |
|---------------------|----------------------|----------------------------|----------------------------|

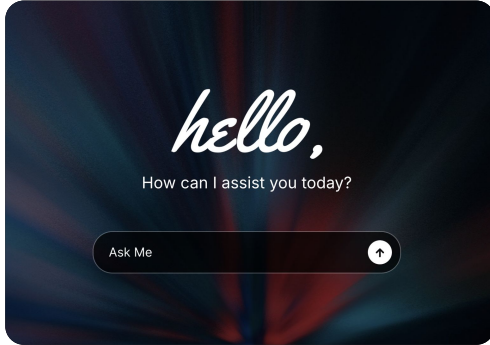
The product suite

Help Desk
Service Desk
Workflows

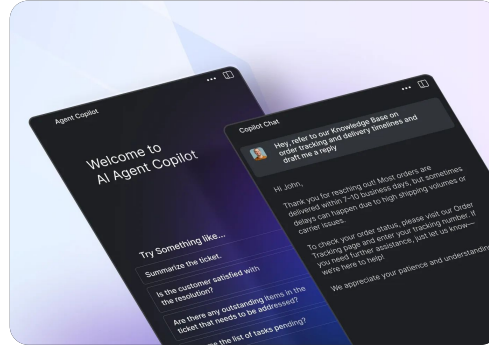
HappyFox AI
Autopilot
Assist AI

Chatbot
Business Intelligence
HappyFox CRM

HappyFox AI Stack



Chatbot



AI Copilot



Autopilot AI Agents

Land + Expand has been our MO

- 1 The Product Suite evolved from listening**
Nine products. Every one shipped because a customer asked, "What else can you solve for us?" That question built the company — and it keeps showing up in every conversation.
- 3 Reactive Expansion vs Proactive Expansion**
Our AEs often reacted to expansion opportunities but there was no proactive workflow to find it without losing too much of their time.

- 2 Every account is an expansion surface**
More seats. More products. New teams in the same org — IT, HR, Sales Ops, Marketing, Facilities.

Can AI give us a huge unlock?

This isn't just a HappyFox problem. This is true at every B2B company.

1

Support reps focus on experience

They optimize for resolution time and customer satisfaction.

2

Sales reps don't read tickets.


They are busy selling to new customers. They depend on support team to pass any obvious opportunities.

3

Unstructured data is messy.

Support tickets are never organized to optimize for sales but often have potential opportunities hidden in them.

Copy our process, build it on any stack



**Build inside your
primary system record**

**Build with Agent
creation tools**

Claude Cowork + MCP

Expansion agent that read at every ticket.

◆ What it does

- Finds expansion signals on every support conversation
- Marks them for reps to review

◆ How we build the agent

- Agent is installed on our support platform
- Agent has context on the business
- Tuned the prompt for SaaS Expansion signals

Outcome & Challenges

- Instantly started surfacing opps
- Refining for larger opp
- False Positives
- Scope improvement

Total cost?

<\$20

Build this on any AI agent stack

As an AI agent who is an expert in identifying expansion opportunities in customer support tickets.

<main_goal> Your main goal is to analyze the given support ticket and determine if the customer is showing signs of interest in expanding their current subscription, purchasing additional services, or upgrading their plan. </main_goal>

<steps_to_follow>

1. Read the given ticket content carefully and understand the context.
2. Look for specific keywords, phrases, or sentiments that indicate expansion opportunity, such as:
 - Direct mentions of upgrades (e.g., "I want to upgrade my plan", "need more advanced features")
 - Requests for additional capacity (e.g., "need more seats", "want to add more users")
 - Inquiries about premium features (e.g., "what features come with the enterprise plan", "cost for premium")
 - Growth indicators (e.g., "our team is growing", "we're expanding our department")
 - Interest in additional products/services (e.g., "do you offer integration with", "interested in your other services")
- Comparison of plan features (e.g., "difference between standard and premium", "benefits of upgrading")
1. Determine if the ticket contains genuine expansion indicators or if these terms are used in a different context.
2. Document your thought process and reasoning in the <thinking> tag.

</steps_to_follow>

Rebuild this on any platform

Create webhook-triggered Zap

Add webhook in platform

Build "ticket created" trigger

Send new ticket payload

Run ChatGPT categorization prompt

Add tag to ticket

Scan to get
the prompt



The Result

\$1M+

In net-new expansion pipeline.
On data we already had.

Where the revenue was hiding

| | | |
|----------------|-----------|------------|
| Seat Expansion | AI Upsell | Cross Sell |
| 19% | 29% | 52% |

Illustrative mix from our 90-day pilot.

Where are other expansion opportunities hiding?

- ◆ Sales call

- ◆ Onboarding calls

- ◆ Learning loop flywheel for higher hits

- ◆ Segmentation is key


DEMO

happyfox Autopilot

Explore our Fleet of AI Agents for SaaS and Technology.

Discover AI Agents built for SaaS and Technology — giving you the edge to be smarter, faster, and effective every time!

Search AI agents by name, description, or skills


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HubSpot Deal Priority Assistant

Evaluates linked HubSpot deal value at ticket creation and raises ticket priority when high-value prospects are detected.

Triage & Detection | Data Enrichment

[Hire Agent](#)


 ||||

Churn Risk Detector

Analyses tickets for signals of dissatisfaction or potential churn and tags them for swift retention efforts.

Account Management
Customer Health

[Hire Agent](#)


 4 Hired ||||

Stripe License Request Insight

This agent analyzes tickets to identify requests for additional licenses, seats, or user accounts.

Triage & Detection
Account Growth & Retention

[Hire Agent](#)


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Expansion Signal Scanner


This agent analyzes and tags tickets from existing customers who may have expansion opportunities.


Account Management
Triage & Detection

[Hire Agent](#)

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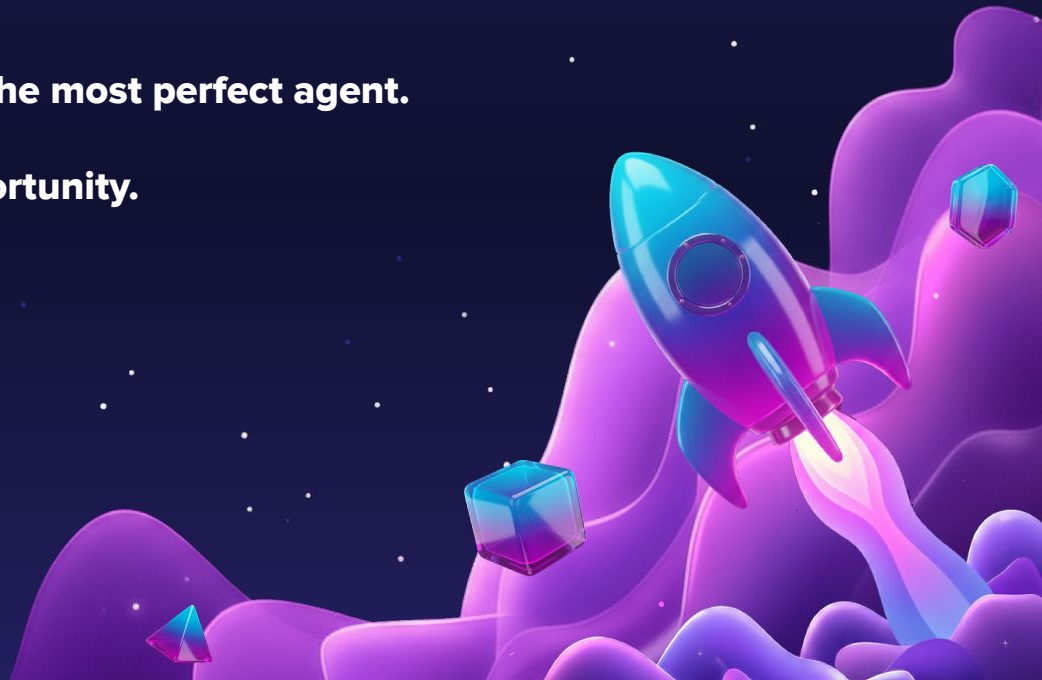
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Key Takeaway

- **Get something done fast. Don't wait for the most perfect agent.**
- **Expansion is the lowest cost growth opportunity.**
- **Unstructured data is no longer a hurdle.**





THANK YOU!

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