

Menu Upsell

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Key takeaways

- Four-step menu upsell process: un-sell what they don't need, prescribe what they do need, ask if they prefer A or B, and make it easy to pay.
- A or B sale (assumed close): offer a choice between two options (e.g., vanilla or chocolate) to get a yes by asking which they prefer.
- Card-on-file close: if you have a customer's card on file, offer to charge that card to remove friction and make purchase easy.
- Detailed, personalized prescriptions (prescription close): write out exactly how and when to use products (e.g., take two in the morning, one at night). Detailed post-purchase instructions increase the likelihood they buy more than vague instructions.
- Assume the purchase when giving instructions (explaining post-purchase behavior assumes buying and reduces perceived wasted effort).
- Tactics are modular — each part builds on the others like Lego pieces and took practice to master.
- Handling sold-out items: recommend nearby substitute options and specify brand/store so the buyer can still get through the program.

Checklist

1. Un-sell what they don't need
 - Explicitly remove unnecessary options so the customer focuses on what matters (tell them what they don't need).
 - Why: reduces decision fatigue and builds trust by showing you're not forcing extras.
2. Prescribe what they do need (detailed prescription)
 - Write out exact post-purchase usage: how much, when, how often (e.g., "take two of these in the morning, one of these at night"), and address common "what if" scenarios (travel, missing doses).
 - Why: personalized, concrete instructions increase the likelihood of purchase because it assumes the sale and removes uncertainty about using the product.
3. Ask A or B (assumed close)
 - Offer two specific choices and ask which they prefer (e.g., "Vanilla or chocolate?" "Kiwi or strawberry?").
 - Why: framing as a preference between two acceptable options assumes the purchase and makes saying yes simple.
4. Make it easy to pay (card-on-file close)

- If you have a card on file, ask to charge that card (e.g., "Use the card ending in 4696?") and physically facilitate payment (slide item/card across counter if appropriate).
 - Why: reduces friction at point of sale and converts interest into immediate purchase.
5. Combine steps into a rapid flow
- After prescribing, immediately ask A/B choice and then offer the card-on-file option; keep transitions smooth to maintain momentum.
 - Why: sequential, quick execution leverages momentum and reduces time for objections to arise.
6. Use assumed-purchase language when prescribing
- Phrase instructions as if they will use the products (e.g., detailed dosing directions without pauses for confirmation).
 - Why: makes the time you spend on instructions feel valuable to the buyer and signals normalization of the purchase.
7. Prepare fallback guidance for sold-out items
- If inventory is unavailable, tell the customer where they can get an acceptable substitute and which brands/stores to use (e.g., "you can get this from down the street; not as good but will get you through the program").
 - Why: preserves the customer's ability to follow the program and maintains credibility when stock is limited.
8. Manage appointment flow and timing
- Keep consults on schedule; if one client runs long, use concise prescription and A/B close to stay on track.
 - Why: high-volume consult days require speed; being on time preserves ability to execute the menu upsell consistently.
9. Practice and iterate (modular skills)
- Build each tactic (A/B close, card-on-file, detailed prescriptions, handling sold-out items) and combine them like Lego pieces over time.
 - Why: the process becomes much more effective with repetition and integration of each component.

Examples:

- A or B sale: "Do you want vanilla or chocolate?" — customer picks one and you slide it across the counter.
- Card-on-file close: "Use the card ending in 4696?" — customer agrees, you charge and complete sale.

Notes:

- Required? No. Strongly recommended? Yes.
- The four parts build on each other and take practice to master; treat them as modular

elements you combine.