



## ***Building Sales Infrastructure to Expand into a New Channel: An HVAC Case Study***

### **The Big Win**

Expanded from a B2C business model to include a successful B2B strategy and infrastructure, growing sales **\$600K in an eight-month time frame** and enabling the owner to sell the business for a significant profit.

*“Our Sales Xceleration consultant was able to quickly make a significant impact by implementing sales tools such as Pipedrive CRM and Align Today throughout the company. He did this remotely via video chats since he was ~6K miles away with a 15-hour time difference. I would recommend him to any company that needs a sales infrastructure built or that needs sales management help.” --Jason Williams, COO*

### **Executive Summary**

A Chinese company, in business for seven years, selling Air Purification Systems with staff in Beijing, Shanghai, and Hong Kong, wanted to pivot from a solely business to consumer (B2C) model (home and retail) to adding a business to business (B2B) sales team and market strategy. The staff in the three locations were not communicating well and lacked consistency and process, so they hired a Fractional Sales Consultant to put the processes and tools in place to transition into a new market channel.

### **Challenges**

- Three locations operating as separate organizations
- Lack of communication and collaboration
- Mix of expatriates and local Chinese employees with limited English-speaking capabilities
- No pricing consistency across the three markets
- Differing exchange rates between countries
- No customer relationship management (CRM) tool
- No sales leadership, management, or oversight



## Solutions

- Implemented Pipedrive CRM
- Selected Align Today for remote communication and task assignments
- Found a video communication tool for mainland China and Hong Kong (government restrictions)
- Created a sales plan and forecast
- Established metric and key performance indicators (KPIs)
- Scheduled weekly sales meetings
- Met with sales team one-on-one
- Developed a sales process with sales stages and close probabilities

## Results

- Fully developed new channel market and strategy
- Retrained B2C salespeople to sell to B2B market
- Increased overall sales
- Owner sold company for significant profit due to market pivot



## Client Overview

Starting Revenue: \$2 Million

Projected Revenue: \$2.6 Million

Staff Members: 12

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