

Expanding Business with Sales Playbook: Technology Case Study

EXECUTIVE SUMMARY

A rapidly growing Construction Technology company working to create a strong sales foundation engaged an Outsourced VP of Sales to help. The SLT knew they needed to maintain consistency across the sales department as they expanded in team size and geography. Through the implementation of the Custom Sales Playbook, the team now has aligned sales stories and a comprehensive platform for integrating new staff members.

THE BIG WIN

Consistency within the sales team was prioritized, aligning with the CEO's **strategic growth plan** spanning from 2024 through 2027.

“Through the Playbook Creation process, [our Outsourced VP of Sales] ran an excellent discovery process and was able to distill our process into a comprehensive document. It greatly enhances the advantages of our Facial Recognition Workforce Management Solution in the marketplace going forward.”

George W. Gilbert II, CEO



CHALLENGES

- Need to prepare for growth by adopting the Entrepreneurial Operating System (EOS).
- Establishing the Account Executive Teams (AE) across the US in 2024.
- Maintain a consistent sales message during the company's rapid growth.
- The team is transitioning from existing sales relationships to an outbound inside sales culture.
- Expanding brand awareness beyond the SE region of the US, driven by the company's growth objectives.
- Need to improve the current Go-To-Market (GTM) strategy.

SOLUTIONS

The successful combination of AI and human information intake has proven to be a powerful tool in the creation of the Sales Playbook. The CEO found this approach immensely beneficial, exceeding initial expectations.

The implementation of the Sales Playbook was a crucial tool to align our team. It has enhanced team efficiency, accelerated task completion, and improved customer engagement, increasing the chances of hitting sales targets.

The Senior Leadership Team (SLT) has committed to an annual review of the Playbook. This will allow for necessary adjustments and improvements, ensuring that the Playbook continues to serve as a valuable resource for our sales team.

RESULTS

- A unified sales message was created to aid in onboarding new team members.
- A consistent sales approach was tailored to each city's needs (Atlanta, Houston, LA, and Phoenix).
- The Sales Playbook provides a resource-rich platform, supporting the CEO's growth strategy and ensuring sales consistency.

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