

SALES COACHING CASE STUDY

What does partnering with a sales coach look like?



OVERVIEW

Six months after launching her event planning company, The Recess Lab, Julia was struggling to gain sales momentum. As an entrepreneur, Julia had landed her first few clients through sheer hustle but didn't know how to establish and manage a sales process that would accelerate business growth.

DEFINING OBJECTIVES

During our introductory call, we collaborated to define the following joint objectives:

- Build a sales structure and roadmap
- Define input metrics
- Create a schedule of sales activities
- Cultivate confidence

THE WORK

YOU DON'T KNOW WHAT YOU DON'T KNOW

With Julia, the first thing I did was take her through the seven steps of the sales process and covered sales language and concepts.

SYSTEMS AND ANALYTICS

We set Julia up with the proper sales systems to keep her organized and on top of her growing list of clients.

We then tapped into The Recess Lab's revenue targets to reverse-engineer the sales goals, define key input metrics, and create a plan for weekly sales activities.

TIGHTENING UP THE SALES FUNNEL

We revisited Julia's sales process and identified opportunities to enhance her interactions with current and prospective clients.

JULIA'S RESULTS

- DEVELOPED AMBITIOUS, METRICS-BASED SALES GOALS
- LEARNED PROACTIVE SALES STRATEGIES
- ESTABLISHED A WEEKLY ACTION PLAN FOR CONSISTENTLY FILLING THE SALES FUNNEL
- ADOPTED A CRM SYSTEM FOR FUNNEL AND CLIENT MANAGEMENT, ENSURING TEAM ALIGNMENT



“Jenny, thank you for your help. Sales coaching has transformed how I think about my business.”

Julia K., Founder + CEO

The Recess Lab