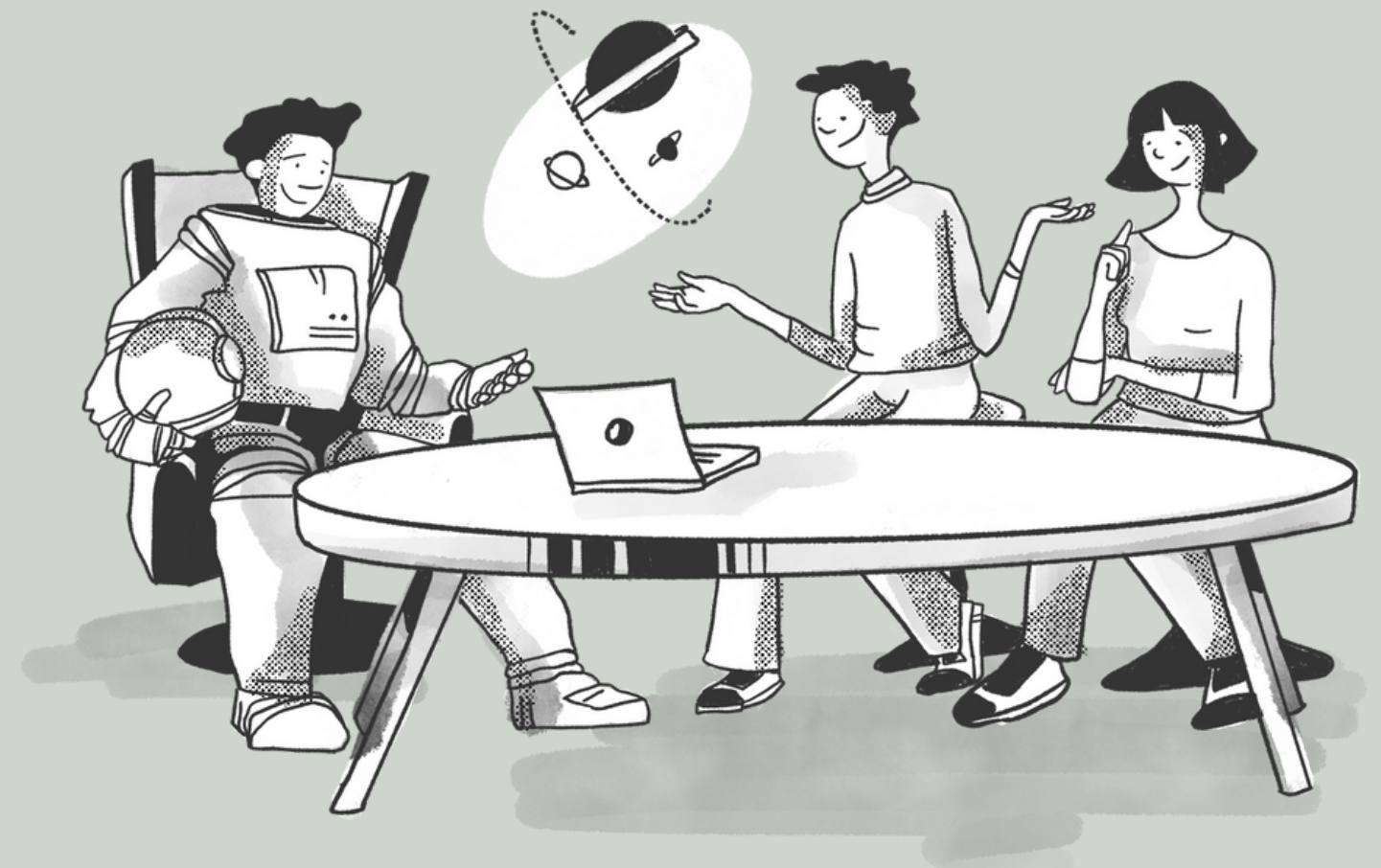


# Building a Sales Strategy, Process & Team

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CASESTUDY



# Content

- 03 Company Intro & Goals
- 04 Market & Competition Research
- 07 Sales Process Setup & CRM Implementation
- 09 Team Hiring & Onboarding
- 12 Meetings with a team & customers
- 16 Overall Outcomes



## Pocket Virtuality

Pocket Virtuality is an expert company in augmented reality. They have built an AR/VR platform using MS Hololens II enabling anyone to use and experience human teleportation.

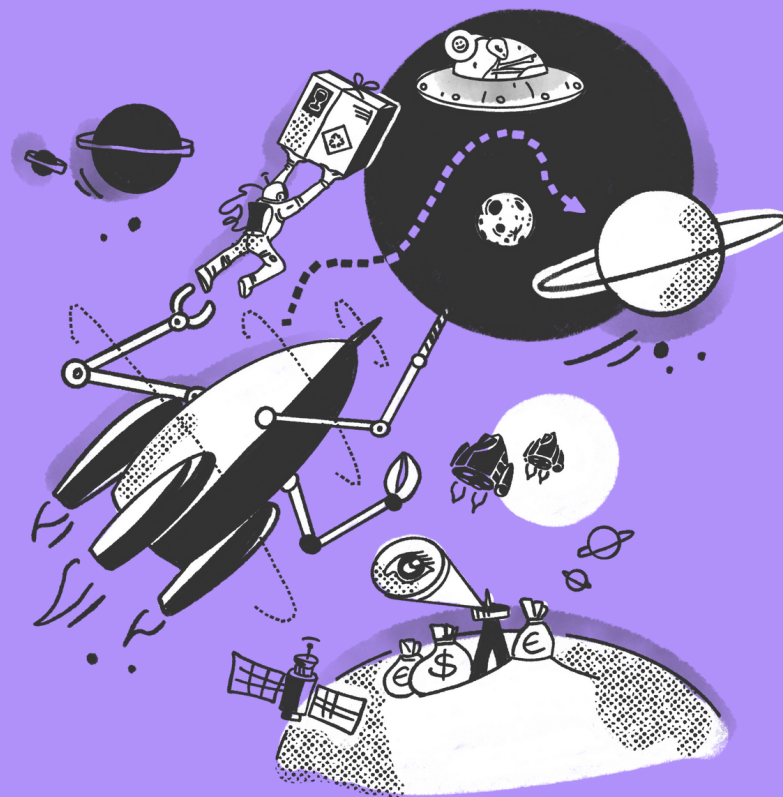
A combination of SW and HW allows experts to navigate service workers remotely during difficult service tasks. It allows any technician or tactical worker to execute any of 1000 different tasks by using an automated AR tasks navigation that attached 3D scenarios to a real world.

## Goals

Pocket Virtuality has invested a lot of money and almost 5 years into a product development. At a time when Fata Morgana was a ready made product, there was a time to sell.

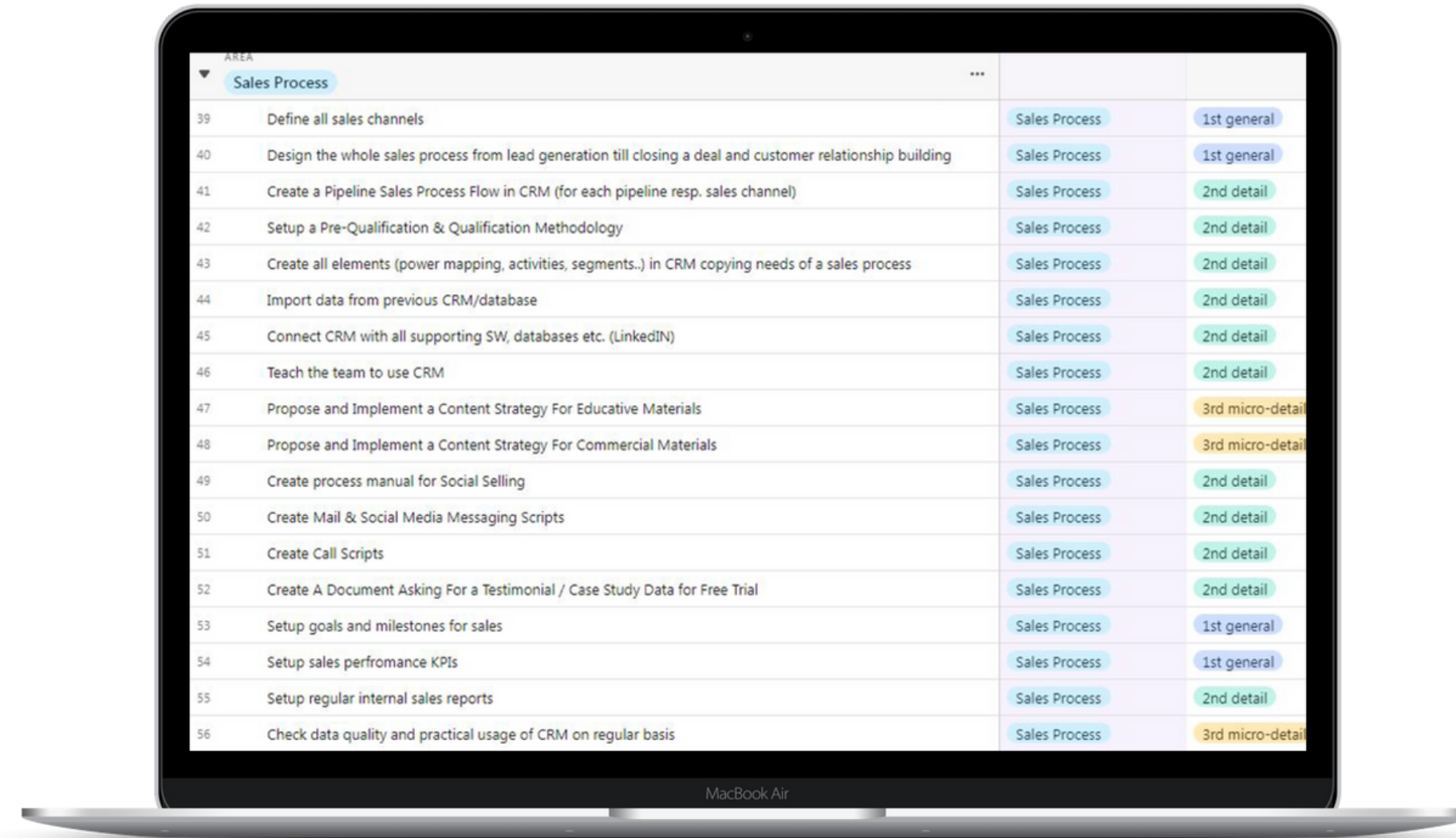
We are asked to help setting up all the essential basics in order to start running a sales operations with clear goals, strategy a processes in place.

# FINDING MARKETS



# Initial Workshop

During our first half-day meeting and us asking dozens of questions we have agreed a 90 steps roadmap to follow.



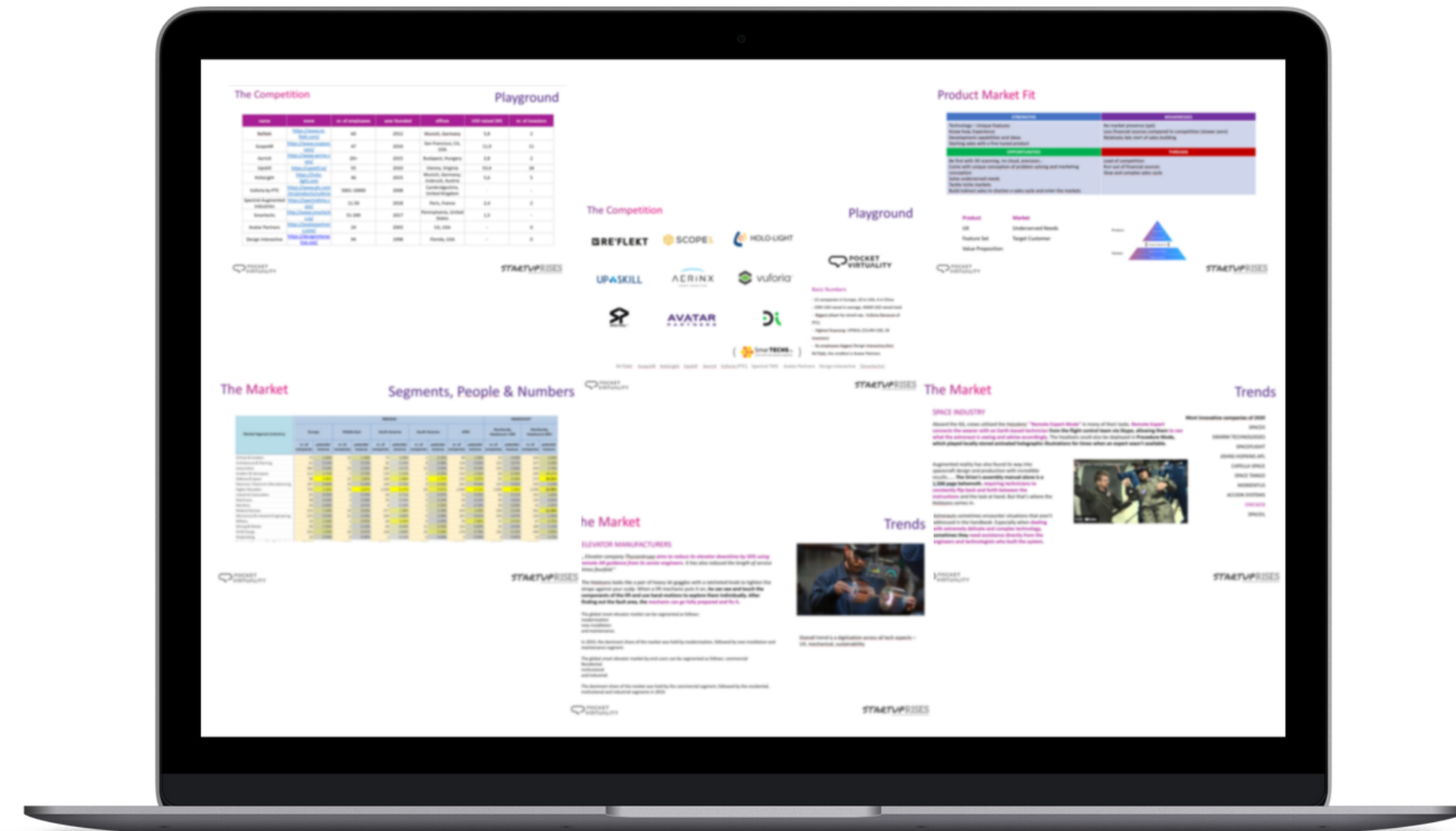
A MacBook Air laptop is shown from a front-facing perspective, displaying an Airtable table. The table is titled 'Sales Process' and contains 18 rows of tasks. Each row has a task description, a 'Sales Process' tag, and a detail level tag. The detail levels are '1st general', '2nd detail', and '3rd micro-detail'. The table is displayed on a light blue background.

AREA	Task	Category	Detail Level
39	Define all sales channels	Sales Process	1st general
40	Design the whole sales process from lead generation till closing a deal and customer relationship building	Sales Process	1st general
41	Create a Pipeline Sales Process Flow in CRM (for each pipeline resp. sales channel)	Sales Process	2nd detail
42	Setup a Pre-Qualification & Qualification Methodology	Sales Process	2nd detail
43	Create all elements (power mapping, activities, segments..) in CRM copying needs of a sales process	Sales Process	2nd detail
44	Import data from previous CRM/database	Sales Process	2nd detail
45	Connect CRM with all supporting SW, databases etc. (LinkedIn)	Sales Process	2nd detail
46	Teach the team to use CRM	Sales Process	2nd detail
47	Propose and Implement a Content Strategy For Educative Materials	Sales Process	3rd micro-detail
48	Propose and Implement a Content Strategy For Commercial Materials	Sales Process	3rd micro-detail
49	Create process manual for Social Selling	Sales Process	2nd detail
50	Create Mail & Social Media Messaging Scripts	Sales Process	2nd detail
51	Create Call Scripts	Sales Process	2nd detail
52	Create A Document Asking For a Testimonial / Case Study Data for Free Trial	Sales Process	2nd detail
53	Setup goals and milestones for sales	Sales Process	1st general
54	Setup sales performance KPIs	Sales Process	1st general
55	Setup regular internal sales reports	Sales Process	2nd detail
56	Check data quality and practical usage of CRM on regular basis	Sales Process	3rd micro-detail

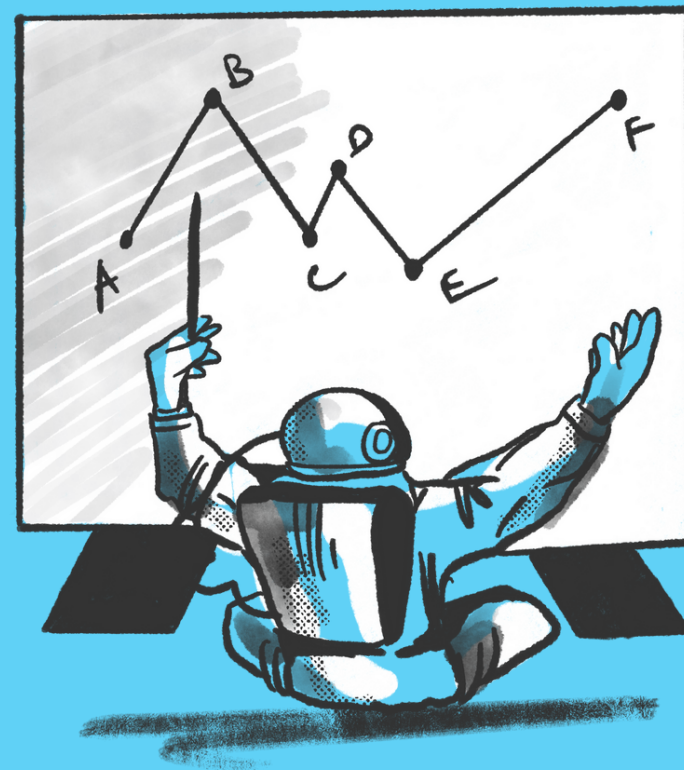
# Finding Target Markets Benchmarking Competition

While Pocket Virtuality had good product knowledge about their competitors, they've never compared their marketing, brand and sales approach, neither target markets, use-cases or key customers. We have conducted a deep research using our XLS templates that provide wide scope of interesting numbers and summarized all outcomes into a strategics deck.

We have also analyzed potential target markets, evaluated them, created niche market prospect databases and measured a velocity of key decision makers in each segment. This helped the sales guys to work with an existing database from day 1.



# SALES PROCESS & CRM SETUP

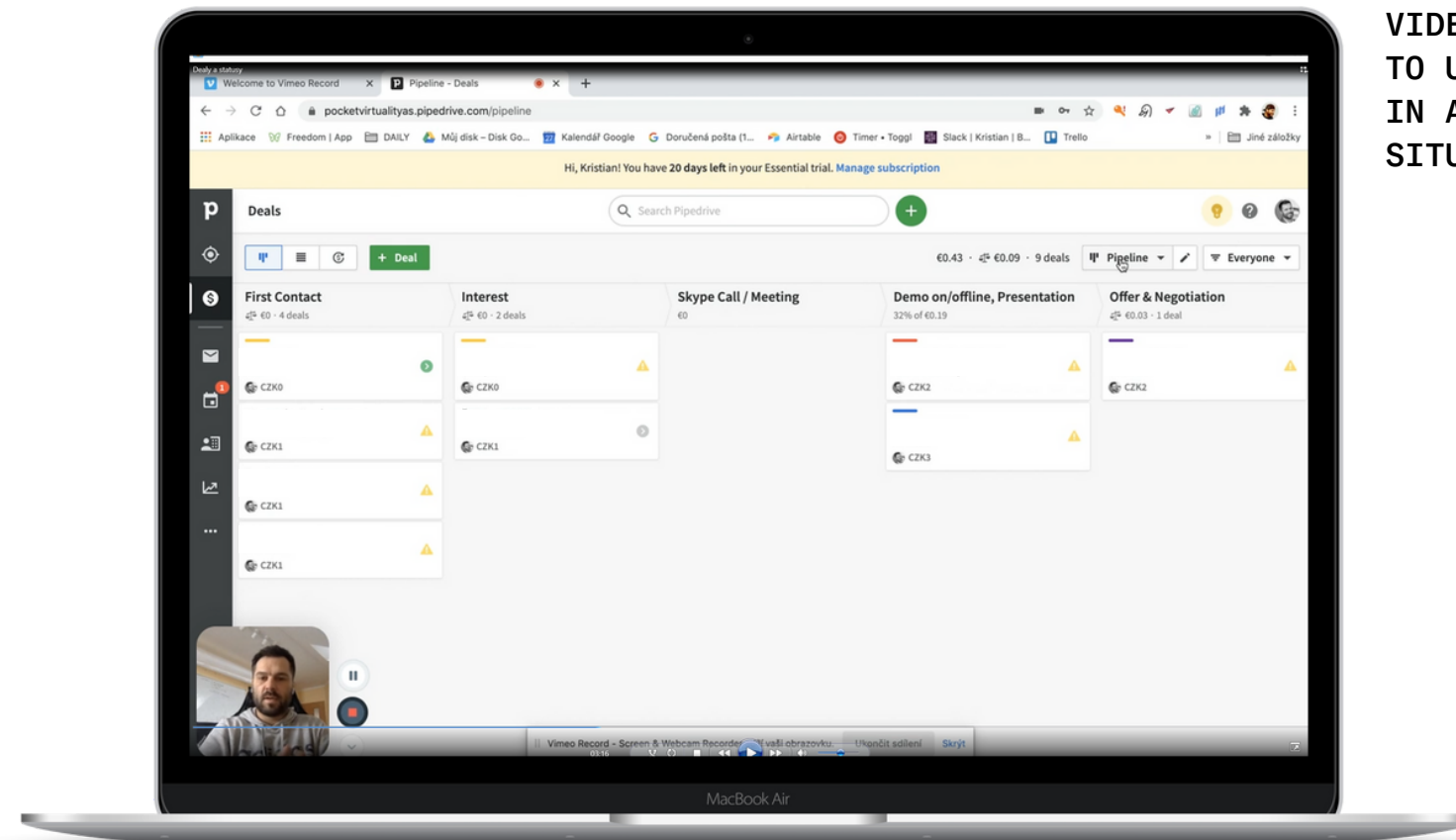


# From Trello to professional sales SW

By analyzing current sales actions and customers reaction we have designed a basic sales process that we kept developing together.

We started with transferring data from "improvized CRM" in Trello to professional Pipedrive CRM system. Whole team started to use Pipedrive during first week and saw the shift in planning, analyzing and executing sales activities.

After first two months of using Pipedrive and having first BDR onboard PV was able to provide investors with specific insights and to show a growing pipeline with market information.



VIDEO MANUAL HOW TO USE PIPEDRIVE IN A CURRENT SITUATION

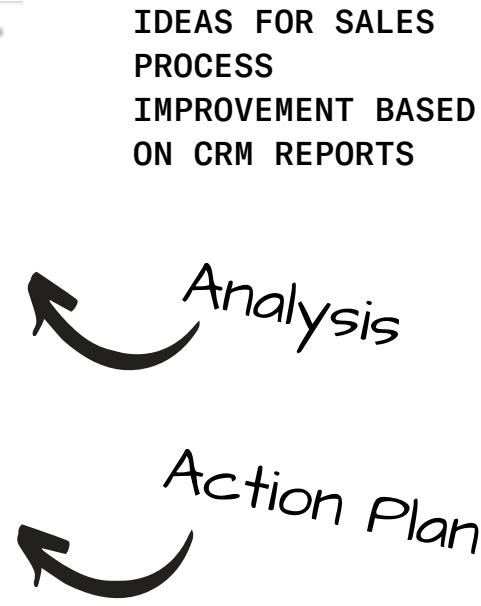


# Improving sales process over time

During our regular sales team meetings we have been discussing the quality and functionality of a sales process. Also we have measure the activities performance, how much is the sales process followed and what steps are necessary to do in order to improve

- Conversion rates
- Deal flowthrough ratio
- Data quality
- Number of stakeholders we talk to
- Follow-up consistency
- Qualification process usage

We have also prepared detailed scripts for asking expert questions in order to get customer data and persuade



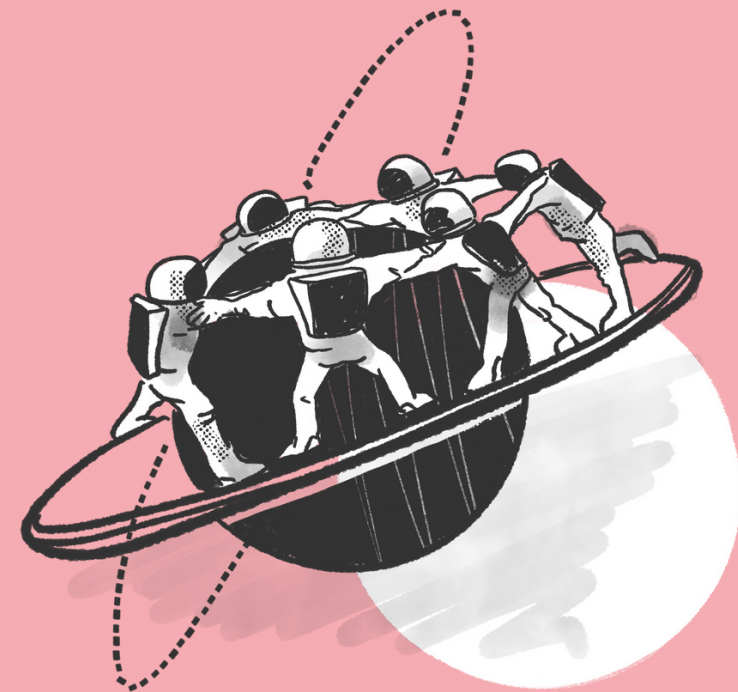
**Getting number for your business case**

Question	Answer	Cost
How many leads do you generate per month?	100	€1000
How many leads do you generate per quarter?	300	€3000
How many leads do you generate per year?	1000	€10000
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How many leads do you generate per year?	1000	€10000

TAILOR MADE QUALIFICATION QUESTIONS TO GATHER IMPORTANT PROSPECT DATA

# TEAM

## Hiring and Onboarding



# Hiring

We have covered the whole hiring process including

- Hiring ad copywriting, hiring posts support
- Candidates pre-selection and pre-screening
- Complete communication with candidates
- Interviews (3 rounds)
- Testing candidates

Over 75 candidates went through our strict hiring process from which 2 made it till the end and started writing a sales story of Pocket Virtuality.

75

+2



# Onboarding

We have helped with onboarding new sales guys through following activities:

- Designing an onboarding agenda
- Initial sales workshops
- Regular weekly meetings
- Double phone calls & giving feedbacks

## KPIs Setup & Bonus Scheme

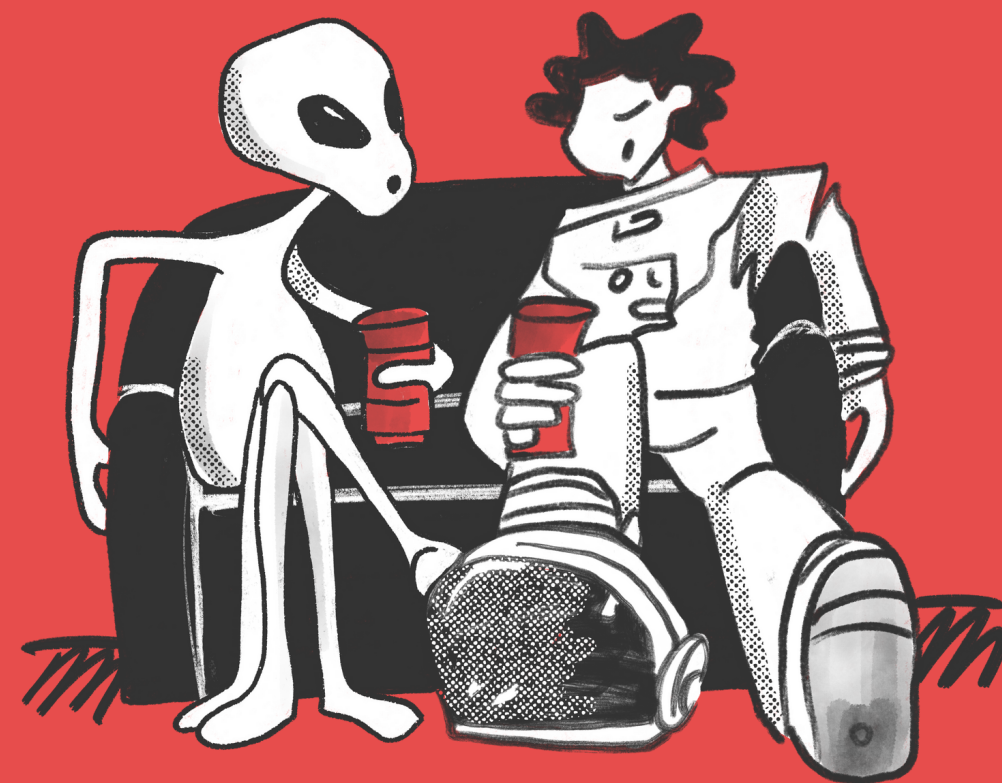
We have setup a specific tailor-made bonus scheme for PV's business model and also designed Performance KPI's in order to kick-start sales activities.

Since the markets were unknown the very first milestone was to launch sales activities and gather real market data from customers.



SALES KPIs  
AND BONUS SCHEME  
SETUP

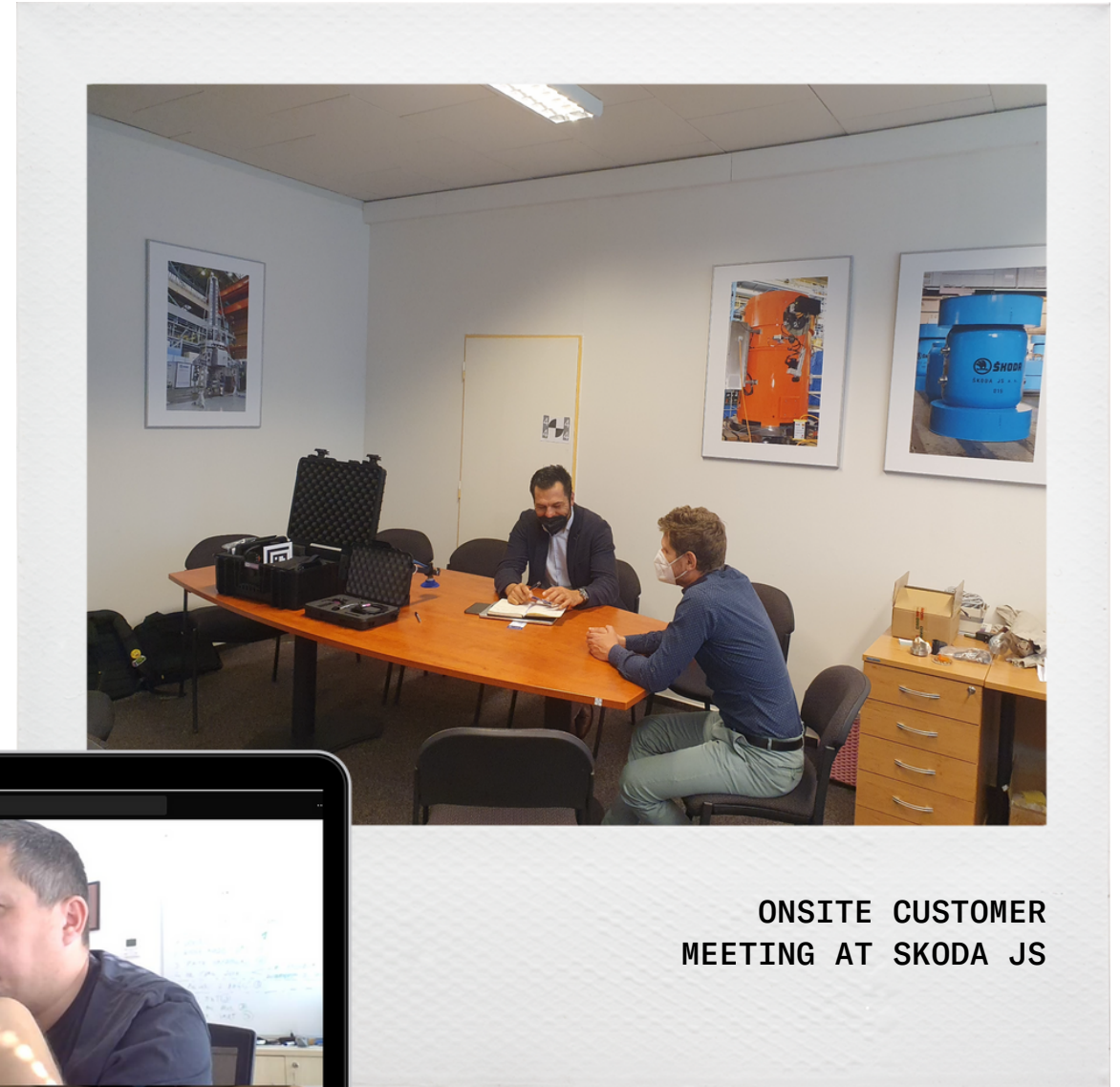
# MEETING CUSTOMERS



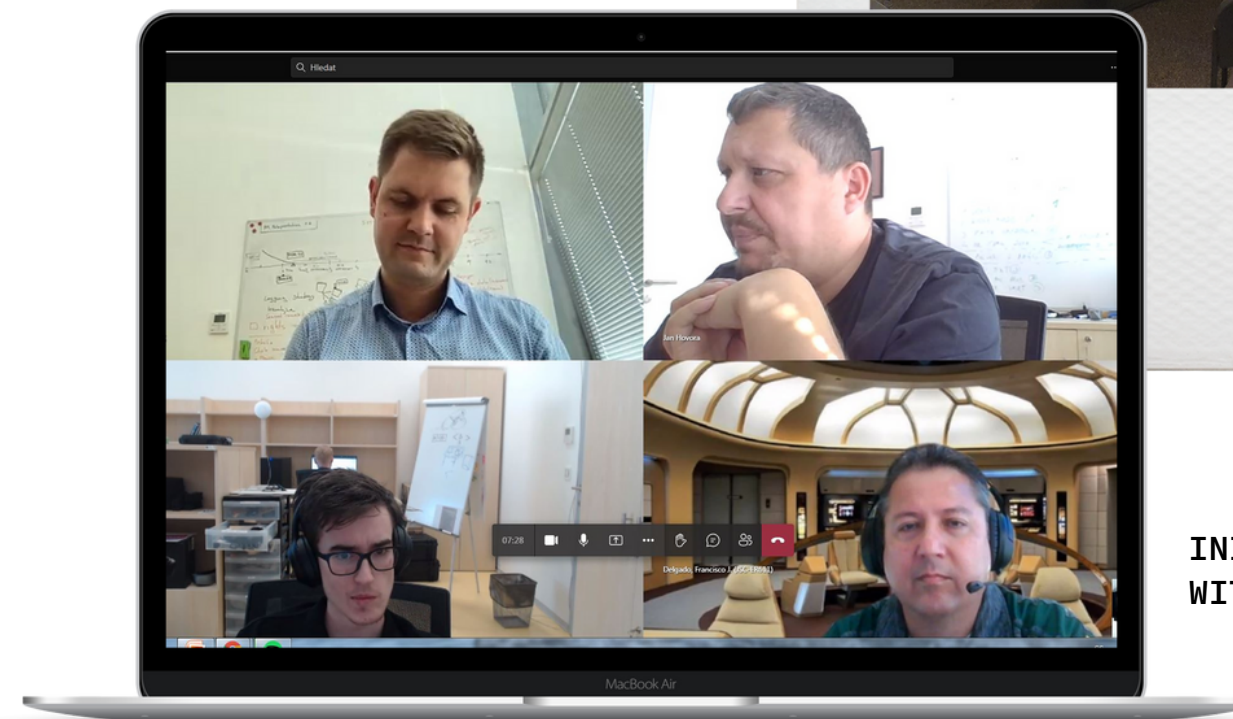
## Strategic support for customer meetings

For bigger deals we were asked for a support or strategic advisory. Thanks to that Pocket Virtuality managed to

- Schedule a huge presentation for NASA and it's XR Community (150 people)
- Negotiate deals in Czech republic
- Establish a partnership with a key distributor and integrater in APEC region



ONSITE CUSTOMER  
MEETING AT SKODA JS



INITIAL MEETING  
WITH NASA

# We enjoy time with our customers



CHASING LEADS AT INDUSTRIAL FAIRTRADE  
MILANO, ITALY, 2021

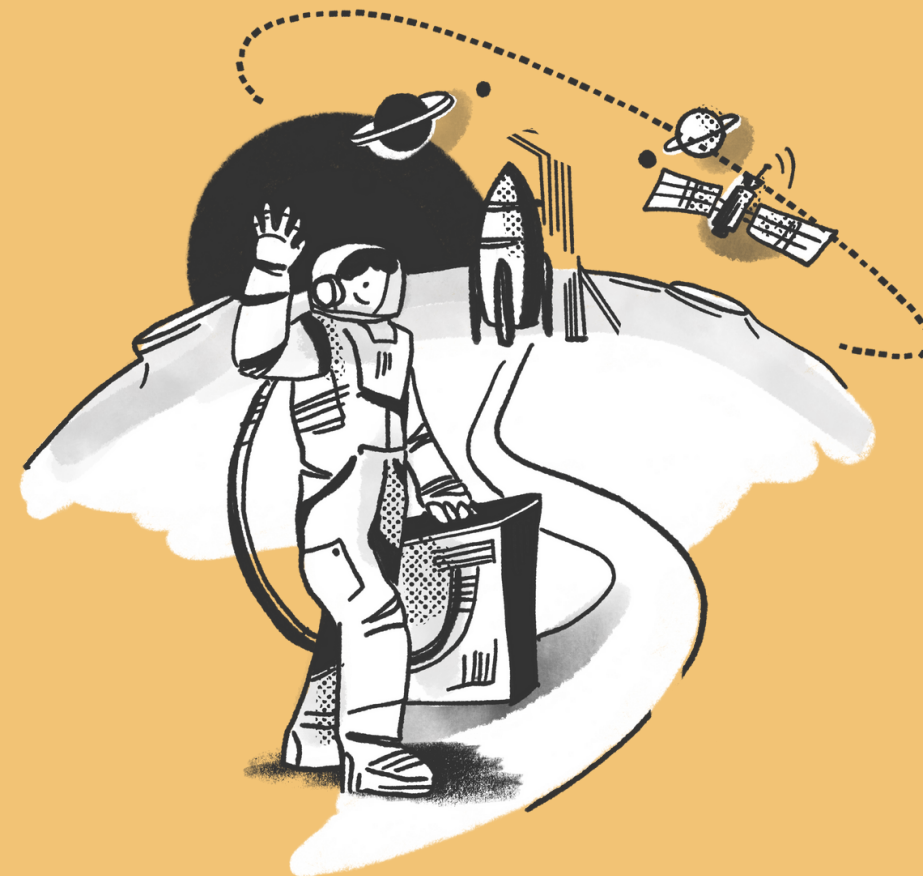


TEAM DINNER



BEING TORTURED BY CFO ONDREJ  
DURING HILL CLIMBING ON A ROAD BICYCLE

# OVERALL





## Shift from product to sales

Pocket Virtuality has transformed from almost strictly development company to a company performing continuous sales activities, opening new negotiations every week and gathering market information from every customer meetings.

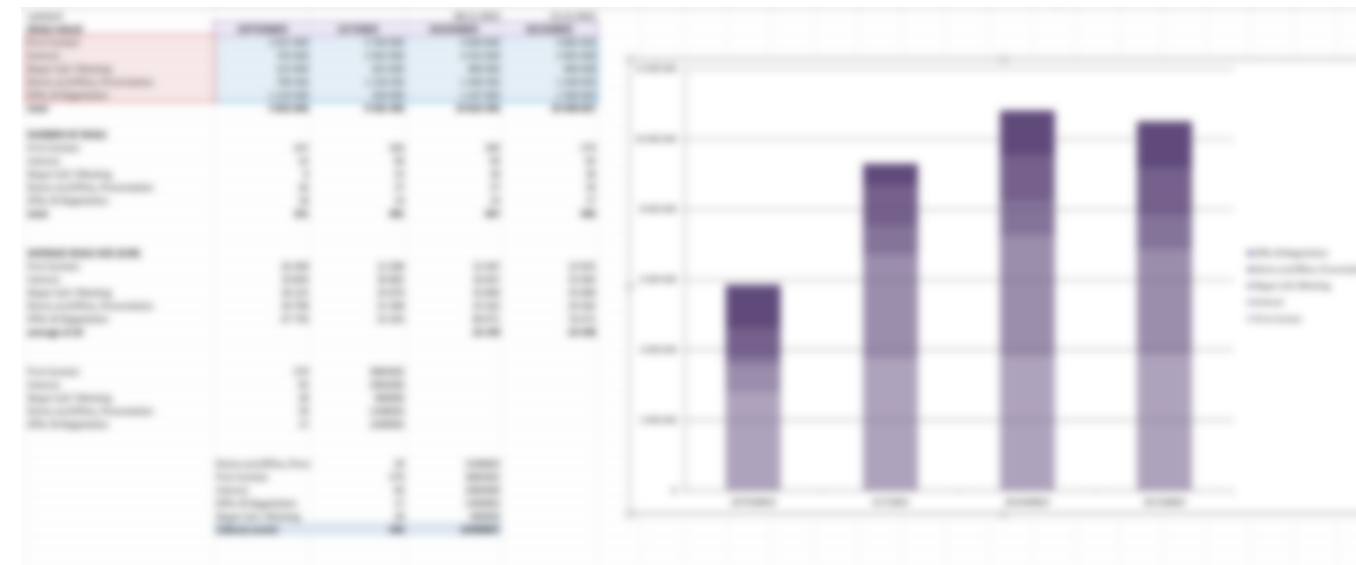
Pipeline has grown from about 20 deals with vague records up to 500 deals with tracked activities, customer information and planned steps. Some of potential deals turned into big projects with a potential revenue over 1M USD.

Sales process and all other sales procedures including

- Sales Manager's OKRs
- Sales Team performance KPIs
- Pricing Policy
- Qualification Process
- 

are documented in DOCs, XLSs and video manuals.

PV is also on it's way to close new strategic partnership and win game changing contracts in 2022.



SALES PIPELINE PROGRESS OVER TIME

**+500**

**\$1M+**

## What our clients say



*"Spacetools helped us build our sales infrastructure from point zero. From initial market & competition research that helped us with identifying our target customers and understanding how to communicate our product, over sales process setup, CRM implementation to hiring and mentoring our sales team. I like the hands-on approach, quick reactions and scope of things they were able to cover - including helping us with preparations for investor's board meetings, scheduling NASA meeting or jumping on a plane to lead our sales team during a conference in Milano. Hope to meet at future projects again."*

Lucie Brešová  
COO, Board Member

# Thank You!

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Founder & CEO

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