



CASE STUDY: Luxury Services

Executive Summary

A Luxury Services Business was looking to hire a Sales Development Professional to scale the business and better weather an economic downturn in the next 10 years.

Challenges

Securing new clients and revenue streams from industries that are more stable in economic hard times.

What was evaluated?

- Roles & Responsibilities of all team members
- Priorities & Workload of the principal
- Marketing & Client Communication

The Findings

- Client deliverables across various stages of each project had to be reviewed by the principal, leaving the operations team of three competing for task assignment and review time

- Limited time is spent on networking and finding new clients through complementary channels
- Lack of consistent engagement with previous clients, a valuable source of new referrals, and limited promotion of business in key markets and channels

The Solution

Reestablish priorities of the principal, assign authority for tasks to team members, and outsource to ensure maximum productivity and effectiveness

- Implement internal processes to allow Senior Manager to dictate tasks to operations team and evaluate deliverables before final client presentation review to the principal
- Refocus the principal to prioritize networking as a daily activity to promote the business and brand with potential clients and complementary industry professionals
- Recommend hiring an Executive Assistant to help schedule meetings, coordinate national publication submissions, and spearhead previous client re-engagement
- Onboard a marketing specialist to maximize effectiveness of both organic and paid advertising channels to ensure consistent messaging

The Takeaway

The principal was creating a bottleneck by controlling all aspects of service delivery and was not devoting enough attention to nurturing new revenue streams and securing new clients. Having an internal approval process in place with the operations team creates more freedom in the principal's schedule, and an established marketing specialist and executive assistant can focus on expanding brand recognition with new and existing customers. Individual autonomy, authority, and clear roles empower the team to work together effectively and scale the business to new heights.

Want an action plan for your business? Get in touch!

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