SALES PROCESS · COMMERCIAL SYSTEMS · SALESFORCE & AI SELLING

Your sales team is better than your sales system.



I work with general managers and sales leaders in mid-size manufacturers on the commercial system: the sales process, the pipeline and forecast, and the Salesforce estate underneath them. Much of my current work is bringing AI into that system in a way that helps the sales team sell, without the unnecessary expense and risk that usually comes with it. Engagements are shaped around the brief, from a short review, fractional, or a longer engagement and role.

BASED
UK

WORKING
UK · Europe · US · on site and remote

FORMAT
Fractional · fixed scope reviews · advisory

NOW
- Taking one more client from January

TECHNOLOGY
Salesforce (Sales, Marketing, CPQ, Agentforce) · Anthropic · OpenAI

£5m
Salesforce transformation led for a $500m listed manufacturer

10+
Acquired business units brought onto one sales platform and one forecast

£5m → £22m
Revenue growth as Managing Director of a Salesforce partner, 2020 to 2025

15+
Years hands-on with Salesforce, from admin to Managing Director

WHO IT IS FOR

Mid-size manufacturers with a sales system that has stopped keeping up.

Typically £20m to £300m turnover. Aerospace and defence supply chain, precision engineering, coatings and heat treatment, test and measurement, industrial services. Usually on Salesforce, sometimes several copies of it.

YOU WILL RECOGNISE SOME OF THESE

- Account planning, pipeline and forecasting are being updated in a spreadsheet because the CRM cannot be trusted.
- Acquisitions or regional teams have left you with two or three Salesforce orgs and three ways of defining a qualified opportunity.
- Quoting is slow, manual and lives in people's heads. CPQ was bought and is half used, or never got past the business case.
- Marketing sends campaigns; sales cannot see which ones produced the meetings that turned into orders.
- Demand in aerospace and defence is growing faster than the sales team can be, and the system needs to carry more of the load.
- Someone has asked what you are doing about AI in sales and the honest answer is "not much yet".

THREE WAYS TO WORK TOGETHER

Start with the review. Build from what it finds.

Each piece stands on its own. Most clients start with the review because it gives the leadership team something concrete to decide on.

01 · REVIEW

Commercial Systems Review

Duration 8 weeks

Format Fractional or full time, on site and remote

Pricing Fixed fee, agreed in writing before we start

Running one now for a FTSE 250 industrial group

A proper look at how the business sells and how the systems support it, or get in the way. I sit with the sales team, finance and operations, not just IT. The Salesforce part is an architecture discovery across Sales Cloud, Marketing (Account Engagement) and CPQ, plus the data and integrations around them.

WHAT YOU GET

- Findings: where the process, data and platform are costing you pipeline, margin or time.
- A commercial systems strategy the leadership team can agree to, written in plain English.
- A sequenced roadmap: quick fixes, consolidation, and what to build next, with rough costs.
- A view on your partners and licences. What to keep, renegotiate or stop paying for.

02 · BUILD

Sales Process into the Platform

Duration 8 to 12 weeks

Format Fractional or full time, on site and remote

Pricing Day rate or fixed fee by phase

Taking the way you want to sell and building it into Salesforce so the system enforces it rather than describing it. Qualification using MEDDPICC or whichever method fits your deal size, stage definitions that mean the same thing in every region, forecast categories finance will stand behind, and quoting that follows the process instead of bypassing it.

WHAT YOU GET

- One opportunity process, one forecast, one set of definitions across teams and orgs.
- CPQ or quoting set up for how your engineers and sales people actually price work.
- A short sales playbook and the reports and dashboards leaders will use on Monday morning.
- An adoption plan: training, cadence and the behaviours that keep the data honest.

03 · MODERNISE

Salesforce Modernisation and AI Selling

Duration Phased, typically 3 to 6 months

Format Fractional or full time, on site and remote

Pricing Retainer or fixed fee by phase

Consolidating ageing or duplicated orgs, fixing the data foundations, then adding AI where it earns its place: account research and call preparation, lead and opportunity scoring, quote generation, pipeline inspection, and agents for routine customer and internal questions. Salesforce native (Agentforce, Einstein) where it fits, other tools where it does not.

WHAT YOU GET

- A target architecture and a phased plan that does not stop the sales team selling while it happens.
- A business case built on your numbers, not vendor slides.
- The first AI use cases live, measured, and either scaled or switched off.
- Governance so the estate stays tidy after I leave.

HOW I WORK

An operator, not a slide deck.

FRACTIONAL	Usually one to two days a week, scaled up or down to suit the brief. Long enough to get into the detail, short enough not to become a fixture.
HANDS-ON	I have run a P&L, led sales teams and configured Salesforce myself. I will be in the org, in the forecast call and on the shop floor, not just the boardroom.
INDEPENDENT	Not tied to a licence sale or an implementation contract. If you need a delivery partner afterwards I will help you choose one and keep them honest.
PLAIN ENGLISH	Findings and roadmaps written for the GM and the FD. Technical detail goes in an appendix for the people who need it.
COMMERCIALS	Fixed fee for reviews. Day rate or fixed fee by phase for build work. Quoted in writing before we start.

TRACK RECORD

Manufacturing and industrial, for most of fifteen years.

Inside a $500m listed test and measurement business I led a £5m Salesforce transformation that brought more than ten acquired business units onto one sales platform and one forecast. At a Salesforce Platinum partner I ran delivery for a global building materials group and delivered a coatings sales programme for a surfacing alloys manufacturer. As Managing Director of a Salesforce partner I grew the UK business from £5m to £22m and reached Summit tier.

Today I am a fractional commercial adviser to a FTSE 250 industrial group, reviewing its commercial systems and consolidating sales teams and Salesforce environments, and an adviser to a US industrial manufacturer on customer experience and commercial operations.

COMPANIES I HAVE WORKED WITH OR FOR

Bodycote · Exair · Saint-Gobain · Wall Colmonoy · Spirent (now Keysight) · Santander · Capital One

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