

# Building a B2B sales channel with AI-assisted prospecting

Education company | Six-month engagement | Go-to-market strategy and revenue operations

## RESULTS AT A GLANCE

**2**

verticals supported by a new B2B sales motion

**4**

AI prospecting agents deployed

**~60**

leads surfaced daily, segmented by buyer profile and intent signals

## The challenge: An established consumer offering without an organizational sales model

An education company sold licensing and continuing education courses to individuals. Brokerages and mortgage companies represented an opportunity to serve organizations with recurring education and recruiting needs.

But the company had no defined B2B buyer profiles, organizational packaging, sales playbooks, or outbound process.

It needed a commercial approach that a small team could operate—from identifying prospects to presenting a partnership offer.

## The work: Build the offer and the process to bring it to market

The engagement connected market segmentation, commercial packaging, and prospecting:

### Buyer segmentation

Defined six behavioral buyer profiles across real estate and mortgage.

### Packaging and pricing

Developed a partnership model incorporating education tiers and recruiting products, with annual membership and placement-fee structures.

### Sales playbooks

Created state-by-state guidance, outbound scripts, four-touch email sequences, and prospect briefing templates.

### AI-assisted prospecting

Deployed four agents supporting selected buyer profiles through LinkedIn and email outreach.

### Workflow design

Designed connections between the CRM, dialer, and AI assistant.

### Outreach coordination

Separated AI-assisted prospecting from an external SDR team's cold outbound to avoid duplicate contact.

AI supported prospect research and initial outreach, giving the human team more time for discovery, qualification, and partnership conversations.

## The outcome: A B2B foundation across two markets

Over six months, the company established buyer profiles, pricing, playbooks, partnership agreements, and an AI-assisted prospecting engine surfacing approximately 60 leads daily.

The engagement created the commercial infrastructure to pursue organizational buyers. Its clearest result was an operating sales capability: a defined offer, identifiable prospects, and a coordinated process for reaching them.

### Expanding from individual customers to organizational buyers?

Goshen Consulting builds the positioning, offers, sales processes, and prospecting workflows needed to enter a B2B market.

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*This case study reflects operating and advisory experience gained by Goshen Consulting's founder in a prior role.*