Zhi Liu

China Client & Commercial Operations

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PROFESSIONAL PROFILE

China-based sales, client operations and business development professional with hands-on experience in customer acquisition, outbound prospecting, client follow-up, market development and cross-functional coordination.

Background spans B2B sales, Forex and Gold client development, financial-market technology, independent product operations and AI-assisted workflows. Experienced in telephone sales, online outreach, customer relationship management and working between commercial and technical functions.

Interested in helping international companies develop and support customers, partners and operations in China.

CORE COMPETENCIES

Business Development · Customer Success · Account Management · Client Operations · Sales Operations · Lead Generation · Client Acquisition · CRM · B2B Sales · China Market Coordination

EXPERIENCE

Independent — FinTech Product & Quantitative Research 2024–Present · Shenzhen, China

Independent work across FinTech products, market intelligence and quantitative research.

- Built and operate Dapex Labs, an independent market-intelligence and decision-support product covering Forex, Gold and Crypto
- Work with MT4/MT5, EA and automated-trading research, market data and quantitative strategy validation
- Handle market-data QA, anomaly review, backtesting, hypothesis testing and structured research validation
- Conduct risk analysis and document both successful and failed approaches
- Use ChatGPT, Claude, Codex and DeepSeek for research, documentation, testing and technical troubleshooting
- Coordinate research, product development and technical work across a small independent team

Sales & Market Development — Forex & Gold Technology 2013–2024 · Shenzhen, China

Sales and client development in Forex and Gold quantitative-trading technology, first within an established trading business and later through my own independent team and operation from 2015.

- Developed customers through outbound calling, online prospecting, messaging channels and direct follow-up
- Managed the sales process from initial contact and lead qualification through product explanation, objection handling and ongoing client communication
- Maintained relationships with prospects and existing clients through phone, messaging and WeChat
- Handled customer concerns around risk, cost, trust, technology and financial-market products
- Recruited, trained and coordinated a sales and market-development team from 2015 onward
- Managed prospecting, follow-up activity and team coordination in a performance-driven environment
- Developed practical experience in business development, client acquisition, CRM and sales operations

Sales & Market Development

2008–2012 · Shanghai, China

Customer-facing sales and market-development work across environmental products and FMCG-related businesses.

- Conducted outbound telephone sales and cold outreach to prospective business customers
- Developed customers and distribution channels through online and offline prospecting
- Visited wholesale markets, distributors and prospective clients in person to identify opportunities and open new accounts
- Managed customer follow-up, relationship maintenance and after-sales communication
- Built practical experience in B2B sales, channel development, negotiation and objection handling

SELECTED PROJECTS

Dapex Labs

Independent FinTech & Market Intelligence Project

Built and operate a live market-intelligence and decision-support product covering Forex, Gold and Crypto. Work includes market-data workflows, product operations, data QA, AI-assisted analysis and technical coordination.

Live project: gfil-lab.com

Quantitative Trading Research & Validation

Ongoing Research Program

Structured Forex and Gold research covering hypothesis testing, MT4/MT5 implementation, backtesting, data QA, risk analysis and validation. Failed approaches are documented and rejected rather than hidden.

TOOLS & WORKING KNOWLEDGE

Business: Business Development · Lead Generation · Client Acquisition · CRM · Sales Operations · Customer Follow-up

Markets: Forex · Gold · CFDs · Crypto · MT4 · MT5 · Market Data

AI & Technical: ChatGPT · Claude · Codex · DeepSeek · APIs · JSON · Windows · Linux · PowerShell

Languages: Chinese — Native · English — Professional Working Proficiency