

PROFORMATIVE An argyle. Company

Strategies for Accelerating Business Growth: A CMO/CFO Partnership

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Intro – Who We Are PROFORMATIVE An argyle. Company

The leading online community of SMB Finance Leaders.

PROFORMATIVE BY THE NUMBERS:

- Over 250,000 unique visitors per month
- More than \$250 billion in purchasing power annually
- Over 2,000,000 users and growing
- 200+ live webinars per year

LEAD GENERATION OFFERINGS

- Webinars
- Business Exchange Listings
- Content Syndication
- Content Creation

Proformative Exchange Listings and Lead Generation campaigns offer :


- High audience engagement
- Great ROI

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Intro - Interactive Q&A PROFORMATIVE An argyle. Company

We will be holding an interactive Q&A at the end of the virtual event

Please submit your questions in the module



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Intro – Today's Presenter PROFORMATIVE An argyle. Company



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Can't we all just get along? PROFORMATIVE An argyle. Company

Marketing

- Revenue Focused
- Cares about the customer
- Market share focused
- Product, place, price and promotion

Finance

- Profit Focused
- Cares about getting paid
- Profit margin focused
- Maximize shareholder value



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Key Barriers to Overcome PROFORMATIVE An argyle. Company

- By its very nature Marketing is an outside-in discipline that begins with the customer, continues with engagement, and never ends.
- Finance is an inside-out discipline that is rigorous and risk conscious

Marketing

\$ROI



Finance

\$ROI

- Impartial Mediator among operations, vendors and other departments within the firm
- Measures management – the quantification of soft measures in hard dollar impacts
- Advanced Big Data Analytics

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Ways to Partner Marketing & Finance PROFORMATIVE an asgph Company

1. Customer Segmentation Analysis
2. Product Pricing
3. Leveraging Customer Touch Points
4. Sales Force Optimization

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Customer Segmentation PROFORMATIVE an asgph Company

1. Start with the customer populations.
2. Filter by division, group or some other measure.
3. Break the subset up by key differentiating characteristics.
 1. For example, are customers bunched in certain regions, target different niches or are in different industries?
4. Work through each differentiating customer characteristic and determine if the number of customers tagged with that characteristic and volume of products or services in which they are purchasing is growing, declining, attiring, maintaining or are a new customers.

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Customer Scoring/Product Pricing PROFORMATIVE an asgph Company


1. Calculate the average sales price per customer per product/service.
 1. Analyze. What do you see?
2. If you are like most organizations, you will notice tight areas of price dispersion around certain customer volume levels.
 1. Are there some customers that have very high volume but also a high average sales prices and if so, why? Are there customers with significant discounts, why is that?
3. Combine Product Pricing with customer segmentation analysis. Are there any correlations? Are certain types of customers lower or higher margin?

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Leveraging Customer Touch Points PROFORMATIVE an asgph Company



- Invoicing is not always about getting paid, sometimes you just need to talk and Finance can help
- Contracts are made to be broken. When something does not go as planned Finance can help get it back on track
- Just because someone can pay everything up front does not mean we want them to, people will buy more when purchases are financed.

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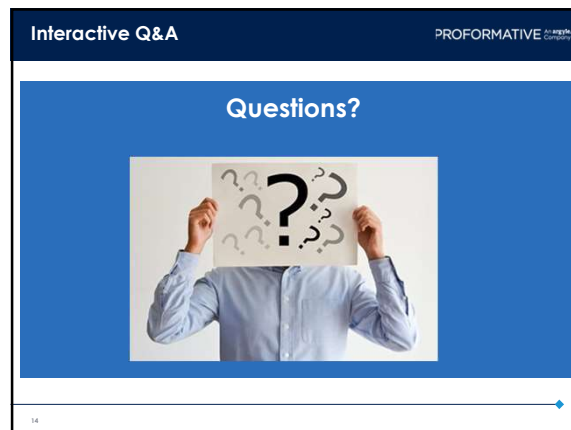
Sales Force Optimization PROFORMATIVE an asgph Company

- Have your top sales people last quarter been lucky, good or both?
- Is there any relationship between growth rate, sales territory size and compensation? Finance loves to run correlation analysis.
 - You'll most likely find that you have many small but fast growing sales territories or segments, and that larger territories may be stagnant or shrinking but often have the most highly compensated salespeople.
- Using external trade data, estimate total market size for a sales territory and if a certain territory is already near or at your estimated capacity, resources may be better allocated to growing areas to capture market share and growth.

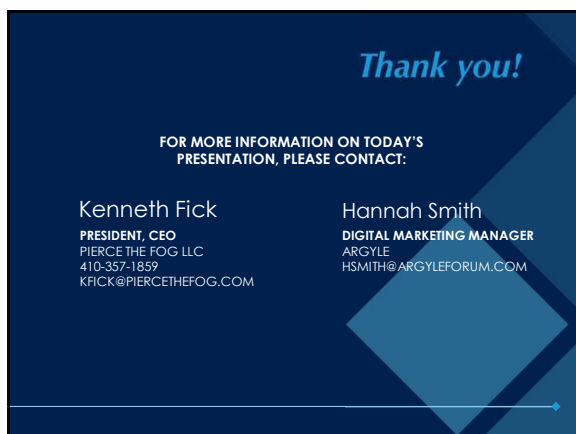
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