FRIPP VT

How to Sell in the Virtual World

with

Patricia Fripp - CSP, CPAE

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1

Best Sales Presentations Secrets

2

Fripp's 5 Steps to Sales Success

Sales Success
Repetition & Reinforcement
Presentation Skills
Product Knowledge
Technical Skills

3

Sales Executive

Delivers some of his demos

Invites Thembani when needed to sell

adra
BY TRINTECH

Thomas Ellis

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Gayla Steiner

Southeast Regional Manager

Research, detailed information

Demo

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Jonny Steindal

Credibility & connection

Comparisons – CRM

Personalize - Airline

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Thembani Mtetwa

Clear, concise, confident

Spoke at a conversational pace

"If you were talk to our clients…"

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Tim Colleran

Credibility, CPA

10 years pre-sales

Preparation

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You are rock stars

You need a great introduction

This is for the customer

Fripp's 3 examples

90% of respondents experience challenges with the financial close process.

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11
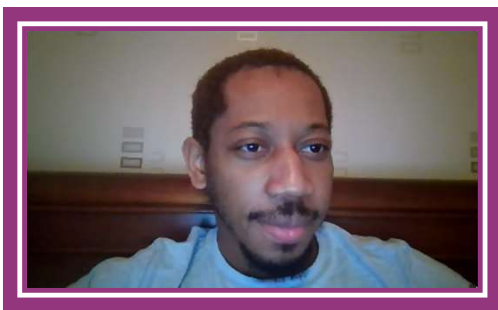
"If it were not a 'thing', what would it be?"

You do not 'dumb down.' You 'simplify and demystify.'

Thembani Mtetwa

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IF IT WERE NOT
A **THING...**

WHAT WOULD
IT BE?

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IF IT'S NOT
FRUIT...

IT'S NOT A
BUNCH

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FAT
& SKINNY
WORDS

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Quality of Your Words

Words = $10.00

Sentences + $30.00

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My #3
Best
Suggestion

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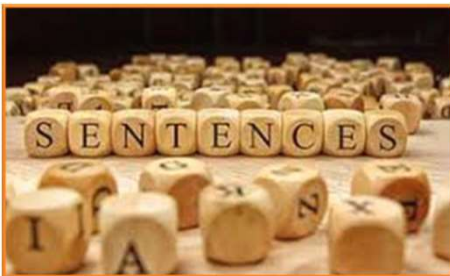
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Everybody is more interested in themselves

Logic makes us think

Emotion makes us act

A Forrester Consulting
Thought Leadership Paper
Commissioned By Trintech

September 2020

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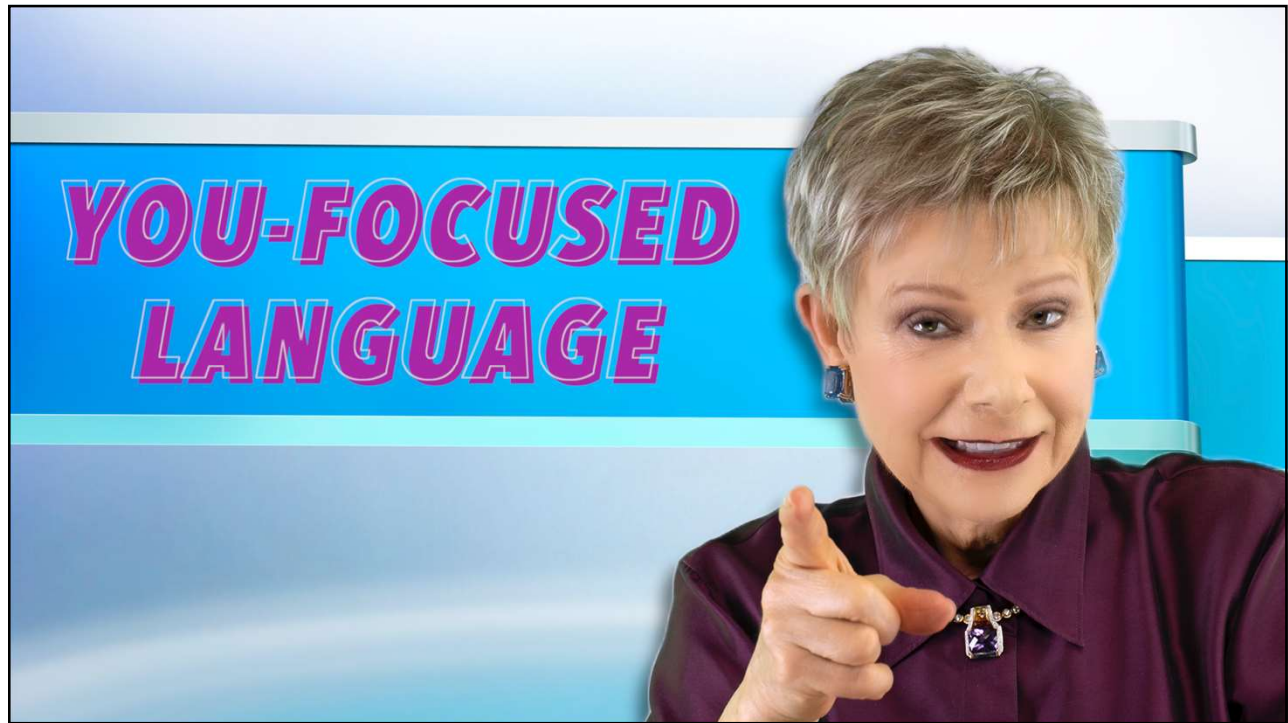
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What you can look forward to hearing…

We have designed these solutions for financial professionals like you…

You have the security of knowing…

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"Sit back and be amazed…

As you discover how we can transform your entire financial systems from record to report"

Leveraging Advanced Technology To Succeed In A Complex Financial Environment

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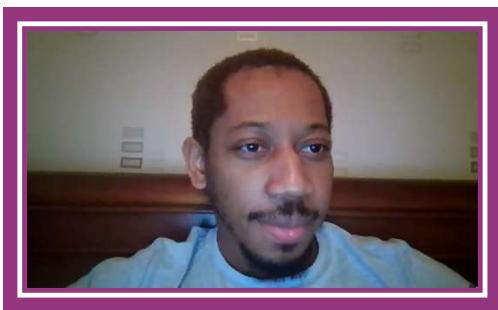
"If you were talk to our clients…"

Thembani Mtetwa

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"Is what we can offer you clear?"

"We most frequently hear volume of transactions and lack of control and visibility? Is that true for you?"

Thembani Mtetwa

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Do you find it time consuming…

Thomas said you mentioned…

In your experience how often have you…

Would it make sense to you…

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AROUSE INTEREST IN YOUR SUBJECT

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THE KEY TO CONNECTION IS CONVERSATION

30

YOUR PROSPECTS WILL NEVER DISAGREE WITH THEMSELVES.

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THE STORY BEHIND THE STATISTICS

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Add an emotion

"Would it interest you…"

"Surprise…"

"Shock…"

90% of respondents experience challenges with the financial close process.

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MY #4 BEST SUGGESTION

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Be Aware of Cognitive Overload

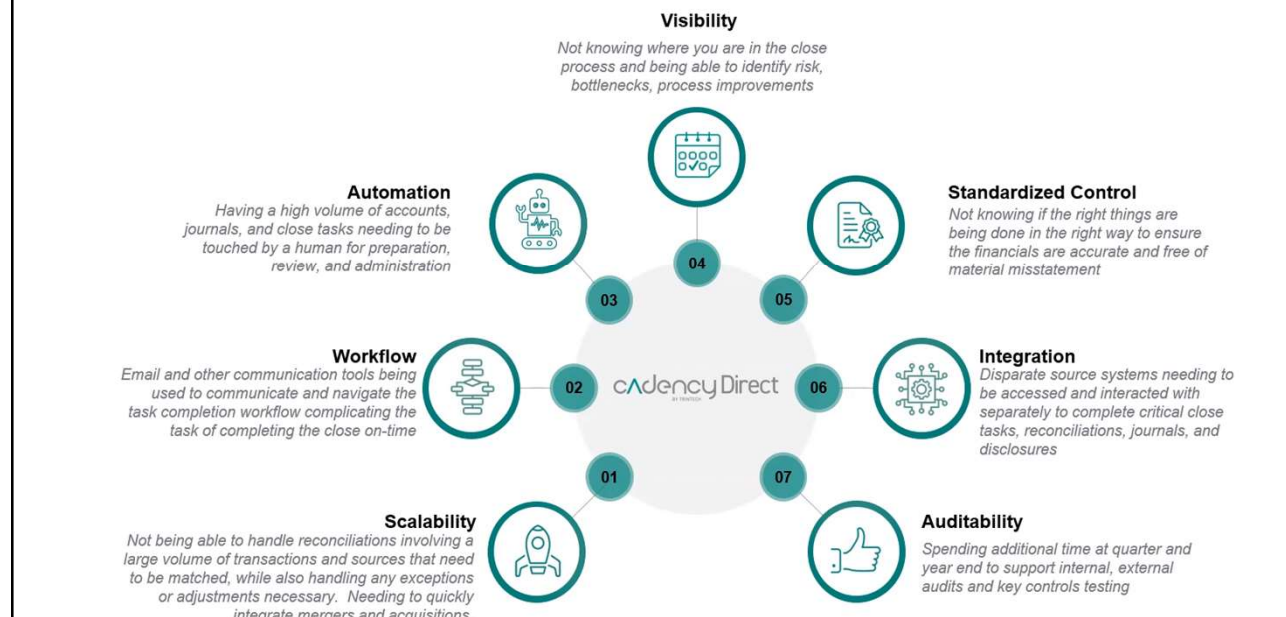# You are more persuasive than PowerPoint

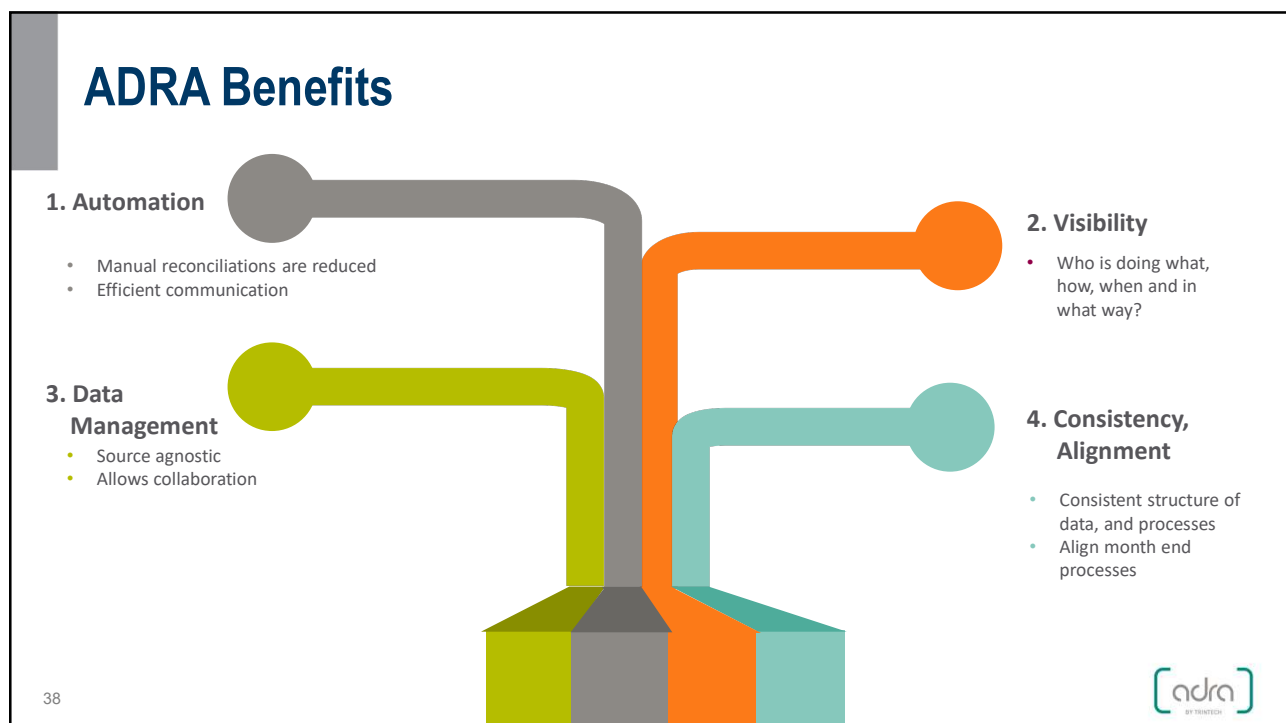# Be aware of random acts of Capitalization

Visual Aids are Visual… aids

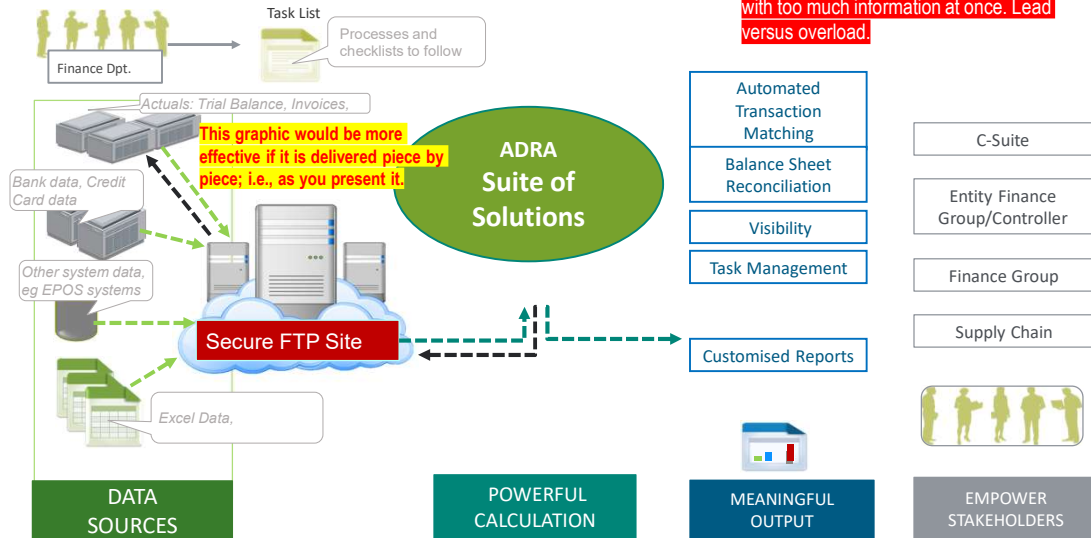SKO ALL IN

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PROBLEMS WE HELP SOLVE

Visibility
Not knowing where you are in the close process and being able to identify risk, bottlenecks, process improvements

Automation
Having a high volume of accounts, journals, and close tasks needing to be touched by a human for preparation, review, and administration

Standardized Control
Not knowing if the right things are being done in the right way to ensure the financials are accurate and free of material misstatement

Workflow
Email and other communication tools being used to communicate and navigate the task completion workflow complicating the task of completing the close on-time

Integration
Disparate source systems needing to be accessed and interacted with separately to complete critical close tasks, reconciliations, journals, and disclosures

Scalability
Not being able to handle reconciliations involving a large volume of transactions and sources that need to be matched, while also handling any exceptions or adjustments necessary. Needing to quickly integrate mergers and acquisitions.

Auditability
Spending additional time at quarter and year end to support internal, external audits and key controls testing

cAdency Direct

04 · 03 · 05 · 02 · 06 · 01 · 07

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ADRA Suite Overview

37   Confidential & Proprietary

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ADRA Benefits

1. Automation
- Manual reconciliations are reduced
- Efficient communication

3. Data Management
- Source agnostic
- Allows collaboration

2. Visibility
- Who is doing what, how, when and in what way?

4. Consistency, Alignment
- Consistent structure of data, and processes
- Align month end processes

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![FRIPP VT logo]

What does the Adra Suite bring?

Finance Dpt.

Task List — Processes and checklists to follow

Actuals: Trial Balance, Invoices,

Bank data, Credit Card data

Other system data, eg EPOS systems

Secure FTP Site

Excel Data,

ADRA Suite of Solutions

Automated Transaction Matching

Balance Sheet Reconciliation

Visibility

Task Management

Customised Reports

C-Suite

Entity Finance Group/Controller

Finance Group

Supply Chain

DATA SOURCES	POWERFUL CALCULATION	MEANINGFUL OUTPUT	EMPOWER STAKEHOLDERS

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Adra Product Portfolio

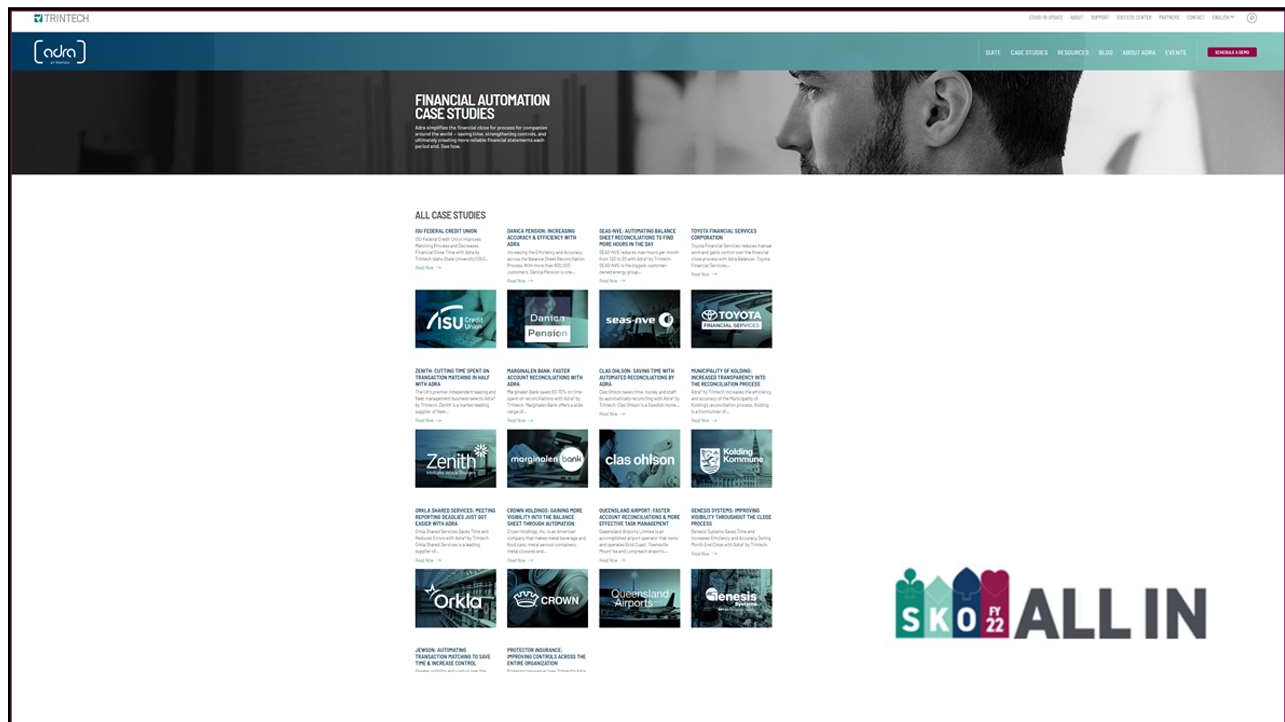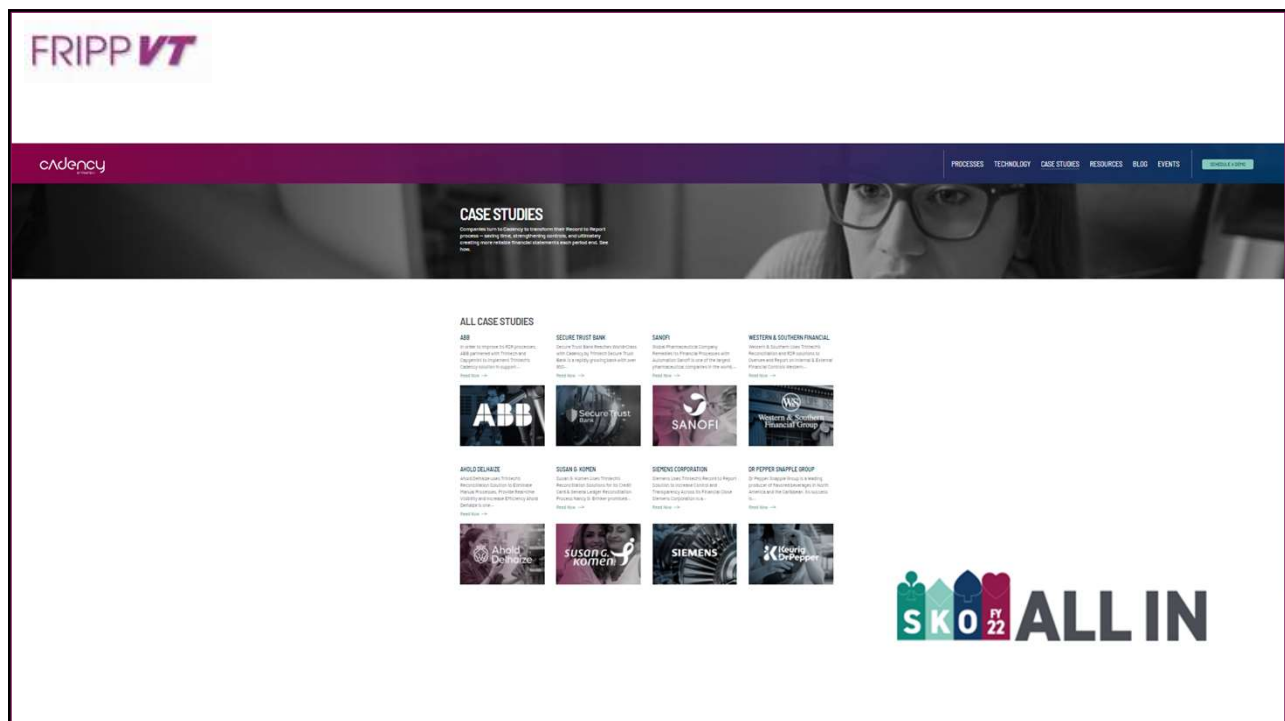| PROCESSES	SOLUTIONS	CAPABILITIES
Process, task and people management	adra TASK MANAGER	Visibility of workload of the team Framework to improve team process Accountability tracker (who is responsible for what) Time management
Balance sheet reconciliation/ substantiation	adra BALANCER	Easy recording of balance sheet recon steps for auditors Recording and monitoring of the roles of different team members Auto verify certain processes
Matcher	adra MATCHER	Connect to multiple sources easily Automate matching and reporting on matches Dynamic rule setting for different recon scenarios
Analytics	adra ANALYTICS	Analyse your data Report on your data internally and for external shareholders Use analysis to improve the finance function of the business

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My #5 Best Suggestion

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GREAT STORIES SELL

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TAKE ALL MY PRESENTATION SECRETS!

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www.fripp.com/handouts

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www.fripp.com/trintech

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Don't celebrate closing a sale.

Celebrate opening a relationship.

Legacy manual processes and complex ERP environments hamper finance teams' abilities to effectively deliver.

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