

TFP's 5 Step Financial Sales Process Facilitates Major Win

"TFP's business case grew the deal to twice its original size, and TFP accelerated the close with 3 year payment terms"

CUSTOMER CHALLENGE

One of our vendor's customers operates with a single mission in mind: provide an education that builds careers and transforms the lives of those who teach, learn and work there. That mission has been difficult to meet due to the customer's internal IT limitations. As the customer has grown to over 100 campuses, their IT and contact center infrastructure has not kept pace. The customer's current switching technology coupled with home grown technology and an under-utilized customer relationship management (CRM) system, has created an environment of frustration for the customer's various business owners.

TFP SOLUTION

The vendor's account executive knew his company could easily help with a solution for the CRM system issues, but he also knew that his company could do more...and displace the competitor's switching technology in the process. So he brought in TFP to help prove it. TFP provided support throughout the sales cycle, including early stage value messaging as well as deal structuring to facilitate an un-budgeted Q4 purchase. As part of the final presentation, TFP created a Q4 Incentive Summary that clearly showed the financial benefits for the customer of purchasing the larger solution today versus over time.

RESULTS

The final TFP proposal showed how the Q4 solution offer could help the customer improve their inbound and outbound call routing strategies, reduce internal support costs and maximize their return on their existing CRM investment. By proactively including payment terms, the AE and TFP allowed the customer to spread the purchase costs over time and the AE was able to preserve his margin. Through the account team's diligence and a clear, compelling offer, the customer awarded the vendor a \$1.28M agreement in Q4.

WHO IS TFP?

Technology Finance Partners "TFP" addresses the growing need for large to mid-size technology companies to value, price and sell their solution in ways that resonate with financial and business decision makers. TFP's financial sales engineers quantify the value of vendor's technology, justify the cost and provide flexible acquisition options. TFP areas of expertise include value-based selling (business case analysis, ROI and

In the Sales Rep's Own Words:

By involving TFP early on in the transaction, the AE was able to displace the competition AND grow the deal to twice its original size. Not only did TFP justify the purchase with a strong business case, but TFP also structured the payment plans that enabled the deal to close in Q4.



"TFP showed how a \$1.28M multi-product solution was a much smarter investment (greater returns) than a less expensive single-product solution. We proactively structured the deal with flexible payment terms as we encouraged them to add some key capabilities that were not part of the original project scope."

"This started as a \$600k deal, with just an adapter for the existing CRM system, but with TFP we added additional software and products, growing the deal to over \$1.2 million."

"This was not a budgeted initiative originally, and even when money was reallocated from other projects, the available budget was still less than the total sale. TFP allowed us to take advantage of a multi-year budget to complete the deal."

"This was a key win as it is a new customer and will lay the foundation for additional business throughout all of their campuses!"

"I always enlist TFP to present the financing and business case as they are a lot smarter than I am!"

**Sr. Account Executive, Americas Enterprise
West Region**

TCO modeling), world-class customer finance programs and rational pricing frameworks.

As this case study describes, it is the teamwork and collaboration of TFP, the vendor and the end-user which ultimately leads to more closed deals, increased deal sizes and fewer objections related to pricing!