

FinListics Applying Selling Value Webinar Series

Objective: *Learn How to Apply Finance in the Sales Process*

The FinListics Selling Value Webinar Series helps you better speak the language of finance and sell more effectively at the executive level. We explore a proven practical methodology used by thousands of sellers worldwide that includes case studies and applications.

In addition to a fully interactive webinar series, participants are given access to the FinListics Selling Value eLearning Courseware as a complement to the teachings in the webinars.

The CHALLENGE

Selling to client executives requires an understanding of their business from a financial perspective, knowledge of their challenges & goals, the ability to show how solutions help address challenges and achieve goals; it also requires proficiency in speaking the universal executive language of business... Finance.

The SOLUTION

Webinar Series & Workshops:
APPLYING SELLING VALUE

Key Features of APPLYING SELLING VALUE

- Learn why using financial analysis can help in better selling to client executives.
- Explore the key drivers of financial performance and how they provide insights into potential business challenges.
 - Revenue Growth
 - Profitability
 - Capital Utilization
- Learn how to effectively conduct research into drivers of change in a client's financial performance, challenges, strategies, and goals.
- Understand the importance of cash flow and liquidity and how they provide insights into a client's propensity to invest in new solutions and what types of solutions they might invest in.
- Discover how to use your analyses to engage in more meaningful dialogue with client executives.

[\(Click here for detailed overview\)](#)

Delivery of APPLYING SELLING VALUE

Blended delivery:

- Three-part webinar series led by a FinListics facilitator, 90 minutes each session
- Self-paced FinListics Selling Value eLearning Courseware

Overview: Applying Selling Value Webinar Topics

Webinar	1	2	3
Topic	Using FinListics Company Summary Report to Gather Client Insights	Conducting Client Research	Using FinListics Industry Summary Report for Private Companies & Lines of Business
Key Objectives	<ul style="list-style-type: none"> How to use the FinListics Company Summary report to better understand a client and conduct more focused research Insights into using report to engage in more meaningful dialogue Participants provide report-back on pre-webinar activities Participants ask questions and are provided feedback regarding their Summary Reports 	<ul style="list-style-type: none"> Become more effective at researching client information like annual and quarterly reports and investor presentations Discover a client's key business and financial goals and factors affecting financial performance Selected participants provide report-back on research conducted prior to webinar Participants share how the research helps to better understand their client, areas to explore further and how they will use the information it in dialogue with the client 	<ul style="list-style-type: none"> The Industry Summary Report is reviewed to help sellers gather insights into private companies and potential areas of opportunity Participants share how the Industry Summary Report provides greater client insights, how they will use it dialogue with the client, and how it helps identify areas of opportunity to explore further with the client
Selling Value eLearning Courseware Component	<p>Module 1: What Client Executives Really Want from Your Solutions</p> <p>Module 3: Three Key Drivers of a Client' Financial Performance</p> <p>Module 4: Analyzing a Client's Financial Performance</p>	<p>Module 5: Cash Flow & Liquidity</p> <p>Module 6: Conducting Client Research</p> <p>Module 8: Case Study</p>	<p><u>See page 3 for details of eLearning courseware components</u></p>
Pre—Webinar Activity	<p>Participants run a Company Summary Report and answer five high-level questions, both of which are submitted to the FinListics Team Room prior to the webinar</p>	<p>Participants research their client and complete several parts of the FinListics "Client Opportunity Assessment" (COA) template, which is submitted to the FinListics Team Room prior to the webinar</p>	<p>Participants run an Industry Summary Report and answer five high-level question, both of which are submitted to the FinListics Team Room prior to the webinar</p>

Overview: Selling Value eLearning Courseware

<p align="center">Module 1</p> <p align="center">What Client Executives Really Want From Your Solutions</p>	<p align="center">Module 2</p> <p align="center">Financial Statement Overview <i>(for Non-Financial Services Companies)</i></p>	<p align="center">Module 3</p> <p align="center">Three Key Drivers of a Client's Financial Performance</p>
<p>Learn what client executives are really thinking, what they really want from your solutions, and how your solutions impact a client's business value.</p>	<p>Improve your basic financial acumen in order to better communicate with client executives through the exploration of the three key financial statements. Also learn how your solutions could potentially impact each of these financial statements.</p>	<p>Explore the three key drivers of financial performance: revenue growth, profitability, and capital utilization. Each of these is defined clearly, the calculation is shown, and various scenarios are investigated in order to illustrate the impact of these drivers on overall financial performance.</p>
<p><i>Approximate running time: 16 minutes</i></p>	<p><i>Approximate running time: 22 minutes</i></p>	<p><i>Approximate running time: 24 minutes</i></p>
<p align="center">Module 4</p> <p align="center">Analyzing a Client's Financial Performance</p>	<p align="center">Module 5</p> <p align="center">Cash Flow & Liquidity</p>	<p align="center">Module 6</p> <p align="center">Conducting Client Research</p>
<p>Learn how to better sell at the executive level by exploring a sales-focused process for analyzing a client's financial performance. We explore what the key drivers of changes in financial performance are, compare them to others in the industry, learn how to value gaps in financial performance, and develop insights into where your solutions potentially add the greatest value.</p>	<p>Explore cash flow & liquidity, learning what they mean, how your solutions can impact them, and how to use knowledge of each to develop insights into a client's propensity to invest in new solutions and what types of solutions in which they might invest. We also use detailed scenarios to illustrate how changes in other areas of financial performance affect cash flow.</p>	<p>Discover how to use financial analysis to direct and guide you in more focused client research in order to discover what their key strategies and goals are, where their greatest challenges lie, and what has been and/or continues to drive their financial performance.</p>
<p><i>Approximate running time: 15 minutes</i></p>	<p><i>Approximate running time: 16 minutes</i></p>	<p><i>Approximate running time: 18 minutes</i></p>
<p align="center">Module 7</p> <p align="center">Advanced Financial Acumen</p>	<p align="center">Module 8</p> <p align="center">Case Study</p>	
<p>Using what you've already learned, you'll explore even more advanced financial metrics such as net operating profit after tax (NOPAT), capital, return on capital, economic profit, earnings per share (EPS), and price/earnings (P/E) ratio. We provide detailed calculations and use detailed scenarios to illustrate each of these concepts.</p>	<p>We use a case study to demonstrate how to apply all that you have learned in Modules 1 - 7, provide tips on developing an initial mapping of your solutions to clients' issues, and review a guide for using your analyses in conversation with a client executive.</p>	
<p><i>Approximate running time: 26 minutes</i></p>	<p><i>Approximate running time: 30 minutes</i></p>	