

ENGAGING WITH CFO'S:

BEST PRACTICES FOR EFFECTIVE SALES CONVERSATIONS



ABOUT US

At CFO Leadership Council, we're a thriving community of CFOs and senior finance executives committed to advancing their companies' goals, improving departmental performance, supporting their teams, and advancing their careers. Our audience represents the decision-makers who shape the strategic direction of businesses, making them a valuable and influential group to engage with.

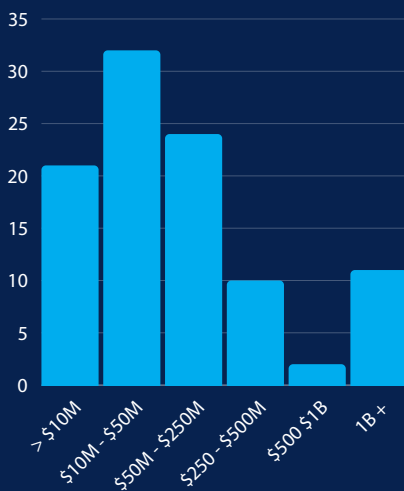
UNDERSTANDING OUR AUDIENCE

Before approaching CFOs, take the time to review the attendee list and familiarize yourself with their specific industries and challenges. This research will empower you to tailor your outreach and craft more compelling conversations.

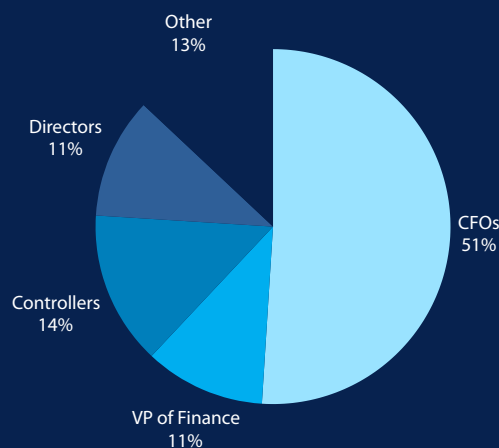
Key Factors to Consider:

- Annual Revenue: Understand the size and scale of the organizations the CFOs represent. This will inform how you position your product or service based on company size and financial resources.
- Employee Size: Recognizing the size of the company helps contextualize the CFO's priorities, challenges, and pain points. Whether they're managing a growing team or optimizing for efficiency, you'll want to speak to their specific needs.

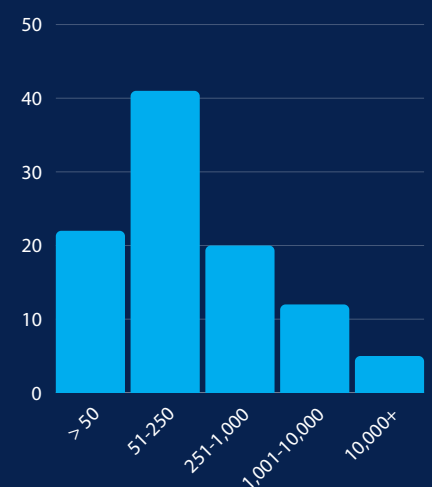
ANNUAL REVENUE



TITLE



EMPLOYEE SIZE



RESEARCH & TARGETING

Before you engage, ensure you have a clear understanding of the key financial challenges CFOs face. Here's how you can refine your outreach:

- **Research Industry-Specific Challenges:** CFOs operate in complex environments. Study the pain points their industries face—whether it's compliance, profitability, cost-saving, or digital transformation.
- **Understand Their Business Priorities:** Know what drives their decisions. For example, a CFO in a rapidly scaling company may prioritize cash flow and efficiency, while one in a more established organization might focus on risk management or optimizing operational spend.

CRAFTING YOUR VALUE PROPOSITION: SPEAK TO CFO PRIORITIES

Your value proposition should be clear, concise, and directly address the specific financial hurdles or opportunities CFOs encounter. Here's how to fine-tune your pitch:

- **Emphasize Quantifiable Benefits:** CFOs are numbers-driven. Highlight how your solution can improve financial outcomes—whether it's in cost reduction, operational efficiency, or revenue growth.
- **Data-Driven Insights:** Strengthen your pitch by backing it with concrete data, real-world case studies, and tangible success stories. Showcase how your solution has already delivered measurable improvements in other organizations' financial performance.
- **Financial Metrics:** Use financial terminology that resonates with CFOs, such as ROI, NPV, IRR, and cash flow analysis. CFOs will appreciate seeing how your solution impacts their bottom line in these familiar terms.

MITIGATING RISK & ENSURING COMPLIANCE

Address any risk management and compliance concerns upfront. CFOs are responsible for ensuring their organizations meet regulatory requirements while managing risk effectively. Here's how you can frame your offering:

- **Security & Compliance:** Show how your solution safeguards their organization's data and meets or exceeds regulatory standards. CFOs will prioritize solutions that ensure compliance and minimize financial risks.

BUILDING AUTHENTIC RELATIONSHIPS

CFOs value genuine, long-term relationships built on trust and mutual respect. To foster these relationships, consider:

- **Engage in Thoughtful Conversations:** Don't focus solely on your product. Discuss broader industry trends, regulatory changes, and other financial matters of interest that impact CFOs' decision-making.
- **Go Beyond the Event:** Use the conference as a starting point. Extend the conversation beyond the event by connecting on LinkedIn or other professional platforms. Nurture these relationships over time, as building rapport is key to establishing long-term partnerships.

STRATEGIC FOLLOW-UP: KEEP THE CONVERSATION GOING

After the event, your follow-up is critical to maintaining the momentum of the connection you've started. Here's how to stand out:

- **Personalized Follow-Up:** Send tailored, thoughtful follow-up emails that recap your conversation, provide additional insights, and keep the lines of communication open. Avoid generic messages—show that you truly listened and are invested in solving their specific challenges.
- **Be Ready to Answer Inquiries:** Be prepared to respond to any questions that arise after the event with insightful, value-driven responses. This is your chance to position yourself as a trusted advisor.

TOP 3 EVENT FOLLOW-UP MISTAKES (AND WHAT TO DO INSTEAD)

1. DON'T pitch your product in the first sentence. DO make your follow-up specific to something you discussed at the event.
2. DON'T add every attendee to your CRM or email list right away. DO focus on engaging qualified leads and invite them to opt in—this leads to better connections and stronger results.
3. DON'T send multiple follow-up emails back to back right after the event. DO politely spread out your follow-up, e.g. send one email within 3 days of the event and then another one to two weeks later.

Contact Us

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