



PLAYBOOK

How to Sell to the CFO

Clari x 30 Minutes to President's Club

What's going on folks! It's Armand crashing the Clari party.

With uncertain market conditions combined with investor pressure to reach profitability - it's no surprise that deals are getting squashed by Finance left, right, & center.

You and I both know, big deals will not close unless you're getting buy-in from Finance.

So today - we'll teach you the best ways to do so.

Instead of...

- Shying away from Finance & getting your deal demolished at the 11th hour
- You'll teach your champion how to pull in Finance early

Instead of...

- Blindly allowing prospects to pull in random stakeholders who will derail your deal
- You'll manage timelines on engaging with the most essential stakeholder - Finance

Instead of...

- Walking into a negotiation with no strategy
- You'll have a framework ready to go to negotiate with Finance

With all that said - across three phases of a sales cycle, we're giving you tools to win the sale with the CFO:

1. The 5-Minute Drill Talk Track:

Sell your champion on engaging the CFO using the 5-minute drill.

2. The Mini-MAP Email:

Cement the CFO into the buying process by sending a recap email explicitly calling out the presentation to finance.

3. Pre-Negotiation Checklist and Live-Negotiation Talk Tracks:

A step-by-step on the beginning, middle, and end of a negotiation.

Let's do it.

About Clari

Clari helps you win more deals, protect your customer base, and achieve revenue precision —even in a downturn.

[Learn More](#)

Discovery: 5-Minute Drill

Sell your champion on engaging the CFO

If you don't set clear next steps, you're setting yourself up for...

- Prospects to ghost you
- Unproductive demo trains
- Below-the-line deep dives

We've all been there.

Especially in today's environment, it's critical to maintain clear next steps that will involve Finance.

The Solution? **The 5-Minute Drill**, which will allow you to...

- Get buy-in from your champion
- Understand clear timelines
- Teach them how to buy on your terms

Here's what it looks like in 3 steps:

1: **DO** you want to buy?

No sense in talking timelines, multithreading, or next steps if the other party hasn't bought into continuing to explore.

You need to pulse-check them.

- If they feel good, move to the next piece.
- If they don't feel good, you must address their hesitations/concerns first.

This Might Sound Like

- 🗣️ "Gut reactions - how are you feeling?"
- 🗣️ "What did you think? Worth exploring further?"
- 🗣️ "Based on what you've seen so far... does it make sense to continue the conversation?"

2: **WHEN** do you want to buy?

Once they feel good about continuing to explore, talk about timelines.

- To further optimize for urgency, tie the timeline to something that is happening in THEIR world (i.e. board wants this done by X date, we will help solve an OKR by Y date).
- But, if you don't have any strict timelines, you could ask for a 'carrot' timeline, or in other words, is there a magic moment (product launch, company all-hands) that could be timed with their go-live.

This Might Sound Like






- 🗣️ "You mentioned XYZ milestone, meaning we'd wanna start by MM/DD"
- 🗣️ "But curious, when's the latest you'd want this in place?"
- 🗣️ "Talk to me about how you're feeling about timelines for something like this"

3: ***HOW*** do you buy?

Once you understand timing, it's time for you to educate them on how to buy it.

Explicitly call out the fact that you'll need to get access to power, then present a business case to the CFO.

This Might Sound Like

-  What we typically recommend next is...
-  [Next] A 60-minute deep dive demo
-  [Next-Next] Loop in Hubert [the prospect's boss] to get buy-in
-  [Next-Next-Next] If that goes well, we'd prepare a business case for finance
-  How does that align with how you've bought software before?

Deal Process: Recap Email MAP

Explicitly call out the presentation to Finance

One, two, three calls (and 5-minute drills) in... your champion's finally bought in. Now it's your job to get on the **same side of the table**.

In other words, you've used multiple 5-minute drills to foreshadow the next steps, but now it's time to **put all of those steps in writing now that your champion is onboard and you're tackling the organization together**.

By sending over a mini-MAP (mutual action plan) in your recap email, you'll lay out the next few steps in the sales cycle. Don't forget to **explicitly call out the names** of folks (including the CFO) you want to get in front of.

Here's what a mini-MAP should look like:

The Mini-MAP Email

Subject: Clari: Go-Live Plan

Tim - Great chatting with you today!

Excited to move things forward with the rest of the team.

That being said, here's what we discussed as the next steps:

- **[MM/DD] Demo with your CRO, Jane:** Goal: Align on a strategy for global revenue predictability.
- **[MM/DD] Proposal Review:** Discuss commercial terms and rollout plan.
- **[MM/DD] Business Case to CFO, Bill:** Present return on investment and business case.
- **[MM/DD] Vendor Review Kickoff:** Finalize Legal & Security review.

Anything I miss?

- Armand

More: [Clari's MAP Template for De-Risking Your Pipeline](#)

Negotiation: How to Close the Deal

The 30MPC x Clari Negotiation Battlecard

With the finish line in sight, here's how you close the deal with our Negotiation Battlecard.

Below is a **Pre-Negotiation Checklist** and **Live-Negotiation Talk Tracks** for each major phase of the negotiation so that no matter the economic environment – you don't have to give away the farm.

Pre-Negotiation Checklist

The negotiation starts **before** the actual meeting. You should know where your deal needs to land and how much leverage you have in the deal based on every past call.

Here's your pre-negotiation checklist using a simple BANT Framework. If you're green across the board, you'll have more leverage and that'll increase your odds of winning the deal.

Pre-Negotiation Leverage Checklist	
Area	R/Y/G
B: Budget - Pricing Leverage	<ul style="list-style-type: none">● There is budget for this purchase + you're the clear vendor of choice● This is budgeted for + you're going head-to-head with competitors● This is <i>*not*</i> budgeted for + you're going head-to-head with competitors
A: Authority - Executive (DM) Leverage	<ul style="list-style-type: none">● DM has seen your solution and has explicitly agreed to working with you● DM hasn't seen your solution, but champion received explicit buy-in● Champion is selling on your behalf and it's unclear if DM is bought in
N: Problem	<ul style="list-style-type: none">● Executive/company-level mandate with quantifiable impact● Strong business case supported with a quantifiable impact● A process or champion-level problem with little quantifiable impact
T: Timeline	<ul style="list-style-type: none">● A "stick" compelling event with big costs to inaction (IE: contract expiration)● A "carrot" soft compelling event (IE: a board meeting, product launch)● Purely relying on the costs of inaction with no explicit reason to move <i>*now*</i>

If you see ● across the board, you shouldn't have to flex too hard on price.

But if there are ● & ● – be prepared to give a discount.

Live-Negotiation Talk Tracks

And the moment we've all been waiting for... the live negotiation. The flow typically goes from giving price, to them asking for a discount, to coming to an agreement and a path forward.

Below you'll find keys to success you can use to crush your next tussle with the CFO:

During the Negotiation: Make the negotiation feel like work	
Giving Price	Talk Track
<p>Explain it, say, it, and stop talking: Explain the structure of the pricing before getting to the number. Once you share the number - don't keep blabbering!</p>	<p><i>Our pricing is determined by 2 factors - the number of employees & the products you're interested in.</i></p> <p><i>With that in mind, the annual cost will come out to \$XXX.</i></p>
When they ask for a discount	Example
<p>Act surprised + ask why: Act like this doesn't happen all the time and put the blame on yourself.</p>	<p><i>Oh wow. I must have messed up here - we're not even the cheapest, but we usually don't find that we're totally out of the realm of possibility.</i></p> <p><i>I guess... what'd you have in mind?</i></p>
<p>Push away: If they're pushing for an insane discount of 50%+, you have to call out the fact that there's a reason they're still there. Get them to opt back in.</p>	<p><i>I know we're not gonna be able to match them or come down 50%. I guess if we're that much more expensive and do the same thing as CompeteCo, why not just move forward with them?</i></p>
<p>Pull them up: If you did the above correctly... they should have given you 2-3 things that make you the preferred vendor. Now, we need them to pay for that value, within reason!</p>	<p><i>So look, I know we need to come to an agreement here. I can't do 50% off - at that point, I can't even walk into the conversation with my CFO.</i></p> <p><i>So what would you be willing to do in return, knowing that we do bring XYZ value above CompeteCo?</i></p>
Aligning on a path forward	Talk Track
<p>Lock down your deal: Before you offer ANY concessions, make sure they can execute the deal in the appropriate timeframe.</p>	<p><i>This is gonna be a really big ask. So I have to ask the question that *my* CFO is going to ask me. If today is the first of the month, can we commit to getting through vendor review and coming to signature by the end of the month? Otherwise - it may not make sense to push this right now.</i></p>
<p>Align on a number: At last, land on a number. But don't go back until you have explicit confirmation from your negotiating partner that the number gets it done.</p>	<p><i>I think we might be able to get a 4 in front of it. But I need to know first, is that going to get it done?</i></p>

And that's a wrap folks!

Those deals aren't gonna sign themselves, so go get yourself in front of the CFO and put those talk tracks to work!

And if you liked where this one came from – that's not the only playbook that'll get your team closer to President's Club. Whether you're trying to land your forecast with 100% accuracy or trying to pinpoint that one slip in a sea of 1000 deals, Clari's got you covered.

Get the CFO Approval Guide (and more) from the Clari team [here](#).

