



Business to Business Mastery Program

B2B SOLUTIONS POSITIONING

Synthesizing Needs,
Recommending Solutions

FACILITATOR'S GUIDE

B 2 B M A S T E R Y P R O G R A M

B2B INDUSTRY
INSIGHTS

B2B
FINANCIALS

**B2B SOLUTIONS
POSITIONING**

B2B VALUE
PROPOSITION

BEFORE YOU BEGIN

About This Guide

This is the Facilitator Guide for the **B2B Industry Insights: Uncovering Insights, Delivering Value** virtual training session.

This guide is structured as follows:

- Each slide has corresponding facilitation notes
- Key guidance is noted by ICONS listed below
- At the start of each module lists timing and Facilitator(s) leading delivering that specific content

KEY ICONS:



ACTIVITY: signifies there is an activity to be conducted.



HANDOUT: signifies there is a handout to be referenced.



SET UP: signifies there is preparation work to be done or specific functionality.



BEST PRACTICE: signifies Facilitator best practice.

You should be familiar with the contents of both this *Facilitator Guide* and the *Participant Guide* before you present this training.

Prior to delivering this virtual training, it is recommended that you **familiarize yourself with ADOBE CONNECT** functionality.







B2B SOLUTIONS POSITIONING:

Synthesizing Needs, Recommending Solutions

FOR INTERNAL TRAINING PURPOSES ONLY: This material contains information that is proprietary and confidential to American Express. It cannot be shared with third parties without American Express.

SESSION OVERVIEW: This Adobe Connect virtual training session provides learners with proven strategies for preparing, identifying and positioning B2B solutions that meet customer current and future business needs and aspirations.

TOTAL PROGRAM TIMING: 90 minutes

Topic	Champions/Speakers	Pages	Minutes
Intro & Welcome	Ted, Kristi, Eric, Bonni, and Shawn	3-10	10
Module 1: B2B Solutions Positioning Mindset	<ul style="list-style-type: none"> M1 Content: 10 min-- Bonni M1 Activity Case Study: 10 min-- Ted, Mike, Eric 	11-23	20
Module 2: The Meeting: Making Your Recommendation	<ul style="list-style-type: none"> M2 Content: 5 min-- Bonni M2 Activity Case Studies: 20 min—Ted, Shawn, Gene & Marla M2 Activity Role Play: 30 min—Ted, Marla & Bonni 	24-40	55
Module 3: Putting It All Together	Ted	41-45	5



PREPARATION:

- Set up the classroom in Adobe Connect, including Chat Boxes, Polling, and Whiteboarding.
- Extend participant rights to make the drawing tools available.
- Know who the tenured and high-performers are so you can be ready to call upon them to contribute their best practices and/or respond to questions.

FACILITATOR NOTES

NAVIGATING OUR VIRTUAL CLASSROOM

The screenshot shows the Adobe Connect interface with the following elements and callouts:

- 1**: Points to the main presentation content area displaying a slide titled "B2B SOLUTIONS POSITIONING: Synthesizing Needs, Recommending Solutions".
- 2**: Points to the "Expand" button (two arrows) in the top toolbar.
- 3**: Points to the "Download File(s)" button in the bottom toolbar.
- 4**: Points to the chat window at the bottom of the screen.
- 5**: Points to the "Notes" panel on the right side of the screen.

On the right side of the slide, there is a numbered list:

- 1** VIEW PRESENTATION
- 2** EXPAND PRESENTATION to fit full screen
- 3** DOWNLOAD HANDOUTS/ JOB AIDS
- 4** ENTER CHAT comments
- 5** VIEW Facilitator NOTES & key take-aways

A small number "4" is located in the bottom right corner of the screenshot area.

FACILITATOR: Ted

REVIEW Adobe Connect functionality and tools available to Learners.

HIGHLIGHT that there will be exercises utilizing the CHAT Pod functionality. There may also be the opportunity to download handouts from the FILE Pod.

FACILITATOR NOTES

LET'S CHAT...



1. What are your **strengths** when it comes to **positioning B2B solutions**?
2. What are **typical challenges** you experience when **positioning B2B solutions**?



ACTIVITY: Ice Breaker Exercise

FACILITATOR: Ted

DO: LET'S CHAT– Ice Breaker activity (Ted)

ASK:

1. What are your strengths when it comes to positioning B2B solutions?
2. What are typical challenges you experience when positioning B2B solutions?



NOTE: As the learner answers come in, be aware of what learners are identifying as challenges. This will “tip you off” on what you need to focus on when delivering the training. Look for opportunities throughout the training to link back to this ice breaker exercises as it indicates what learners are currently challenged with and what they want to learn more about.

B2B MASTERY PROGRAM Your Learning Journey

LEVEL I

B2B FOUNDATIONS

B2B TEST-OUT ASSESSMENT

B2B MASTERY PROGRAM CURRICULUM

- GCP – B2B Fundamentals
- B2B Overview for Account Development Part A
- B2B Overview for Account Development Part B
- Assessing B2B Customer’s Needs
- Positioning Our B2B Solutions
- B2B Treasury Series



LEVEL II



“SHOW ME HOW” SERIES

SHOW ME HOW VIRTUAL TRAINING SERIES

- MAY: B2B Industry Insights
- JUNE: B2B Financials
- **AUGUST: B2B Solutions Positioning**
- SEPTEMBER: B2B Value Proposition

ON AIR REINFORCEMENT

Leverage ON AIR calls to reinforce monthly topic

KEY TAKE-AWAYS VIDEOS

Reinforcement video(s) on the topic covered for that given month will be provided to learners.

SHOW ME TRAINING ASSESSMENT

LEVEL III

PRACTICE & ASSESS

ON THE JOB PRACTICE: ROLE-PLAY OR IN FIELD OBSERVATION

- **PRACTICE:** Provide learners with self-directed on-the-job activities and role-plays to practice and reinforce learning.
- **COACH:** Leaders to provide coaching before, during and after a customer interaction.
- **ASSESS:** Leaders to assess learner proficiency against B2B Mastery core competencies and make recommendation for certification.

FACILITATOR: Ted

REVIEW: 3 Levels of B2B Mastery Program.

DO: Link back to *LEVEL I: B2B Foundations and LEVEL II: Industry Insights & B2B Financials*. Find opportunities to link this learning to today’s sessions.

WELCOME MESSAGE



Kristi Lane
US Verticals, VP Sales &
Account Mgmt, Large Market



Eric Frankovic
VP Strategic Rel Mgmt,
Global Client Group



FACILITATOR: Kristi & Eric

DO: Leader Welcome Message

FACILITATOR NOTES

INTRODUCTIONS

Your Program Speakers



Bonni J. Koerner
Dir., B2B Expansion,
GCPi-GCP
GLOBAL CLIENT GROUP



Shawn M Thomas
Director, Account
Development
LARGE MARKET



FACILITATOR: XXXXXXXX

INTRODUCTIONS: Each CHAMPIONS introduces themselves.

FACILITATOR NOTES

LEARNING OBJECTIVES

B2B SOLUTIONS POSITIONING

During this session, participants will...

- Review best practices for establishing a holistic B2B solutioning mindset
- Review steps for identifying appropriate solutions based on customer needs and aspirations
- Explore strategies and success behaviors for positioning solutions with key stakeholders.



FACILITATOR: Ted

READ the slide

REVIEW course learning objectives.

TRANSITION: Learning Roadmap (Agenda)

FACILITATOR NOTES

B2B SOLUTIONS POSITIONING YOUR LEARNING ROADMAP

MODULE 1



B2B Solutions Positioning Mindset

- Preparing Your Recommendation
- Linking Your Solution
- Meeting Preparation Best Practices
- **SHOW ME:** Champion Success Stories: *Preparing Your Recommendation*-CASE STUDIES

MODULE 2



The Meeting: Making Your Recommendation

- Structuring the Meeting
- Overcoming Obstacles & Objections
- Success Behaviors: Making the Recommendation
- **SHOW ME:** Champion Success Stories: *Making Your Recommendation*-CASE STUDIES & ROLE PLAY

MODULE 3



Putting it All Together

- Summary of Key Points
- Continued Learning Opportunities
- Action Planning

10

FACILITATOR: Ted

REVIEW Learning Roadmap (Agenda).

FACILITATOR NOTES



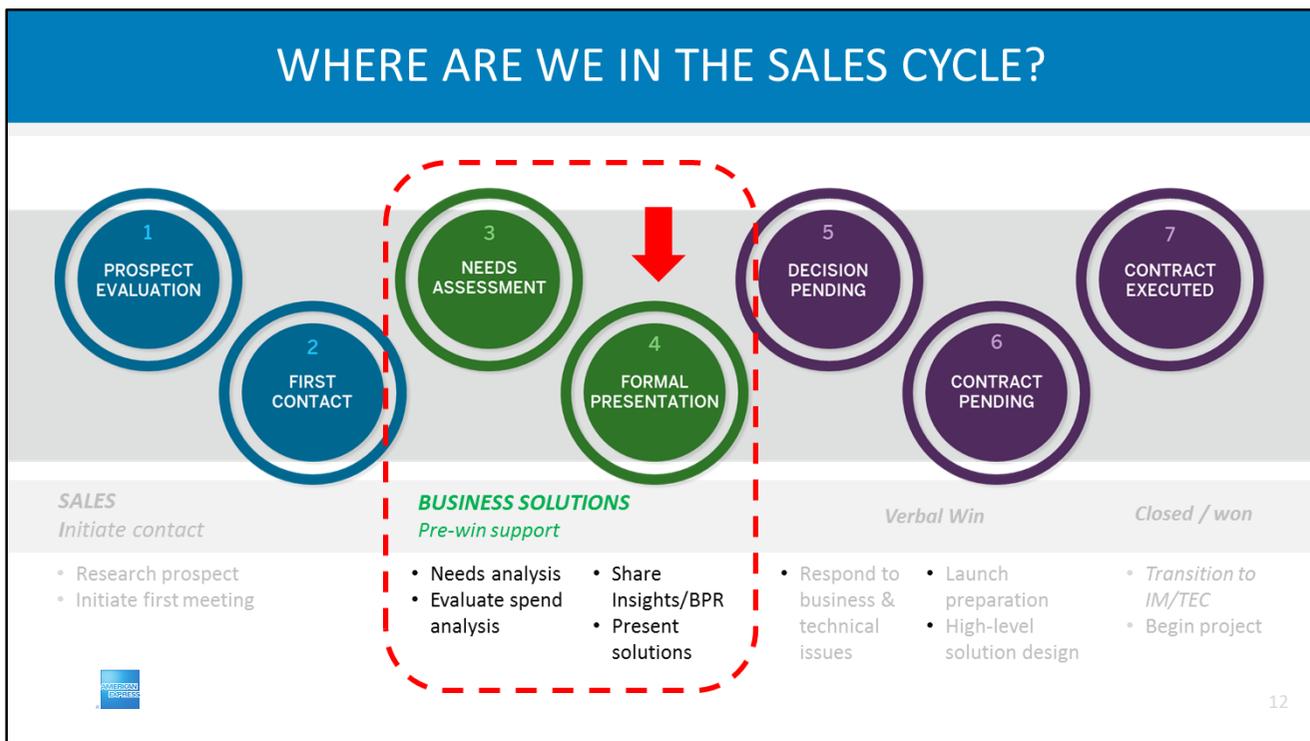
B2B Solutions Positioning Mindset

- Preparing to Make Your Recommendation
- Preparing Your Presentation
- Conducting the Meeting

FACILITATOR: Ted

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FACILITATOR NOTES



FACILITATOR: Bonni

EXPLAIN: Remind learners of where we are in the sales process.

FACILITATOR NOTES



GROUP DISCUSSION:

How do you prepare for a customer presentation?



FACILITATOR: Ted



DEVELOPMENT NOTE: Set up CHAT PODS in Adobe Connect

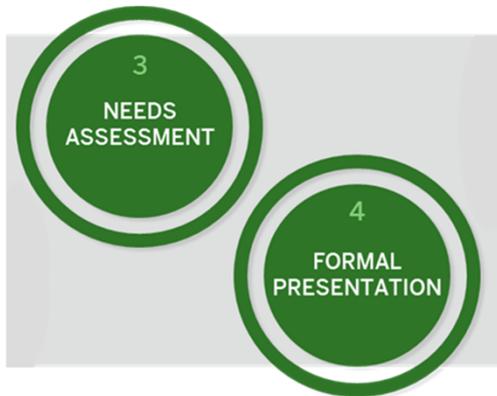


ACTIVITY: CHAT GROUP ACTIVITY

SET UP CHAT: “How do you prepare for a customer presentation?”

TRANSITION: Now that we have reviewed some of the ways in which you currently prepare for your customer presentation, let discuss some prescribed steps for presenting your recommendation.

STEPS FOR PREPARING YOUR RECOMMENDATION



- 1 | RESEARCH FOR INSIGHT
- 2 | LINK SOLUTION
- 3 | IDENTIFY IMPACT
- 4 | DEVELOP PITCH & PRESENTATION



14

FACILITATOR: Bonni

REVIEW slide.

NOTE: This slide introduces the four steps for preparing your recommendation. These steps link back to the challenger approach. The following slides deep dive into each of these steps.

TRANSITION: Let's now take a detailed look at each of these steps.



FACILITATOR: Bonni

- 1. RESEARCH FOR INSIGHT:** Research to identify INSIGHTS, internally, externally, using Watson, client website, client Annual Report, CEO Letter, Analyst Reports, Quarterly Earnings Calls, Forms 10K, DEF14A and/or Form 20-F when applicable, etc. Gain a solid understanding of the client's current situation, what is priority for them and what they are measuring.
 - Client Financials / CFO Letter to Shareholders
 - Watson, Hoovers, and other company research sites
 - P2P / B2B Consulting Engagement
 - Stakeholder & SWOT Analysis
 - Spend File / Spend IQ Submission
 - Competitive Intel if client has dual program
 - Working Capital Analysis: Requires approval – analyzes client's DPO compared to specific competitors (GCG / USLM – requires approval) Additional criteria: Public Company – this is a GPM product offering but might be a good fit – contact is Alberto Martellini
 - Guru Focus (provides WACC for public companies that can be used in ROI calculator)
- 2. LINK SOLUTION:** Link to our SOLUTION and Value Prop - considering the INSIGHTS gained, how can we best help the client and what is the best B2B spend opportunity? (What products, solutions would best link to the client goals, initiatives or KPIs?)
- 3. IDENTIFY IMPACT:** Identify the IMPACT and quantify the ROI based on the proposed B2B SOLUTION that links to the client's need. Identify how our solution will positively impact their business and calculate the ROI.
- 4. DEVELOP PITCH & PRESENTATION:** Develop the client pitch presentation based on everything learned and identify target Executive. Prior to meeting with a client Executive practice making the pitch to your Leader.
 - Leverage internal teams to support a holistic offering: B2B Development, Spend Analytics Team, Leadership, BSM / Tech Teams, etc.
 - Practice in advance! Leader, SMEs, co-meeting attendees, etc.
 - Critical Next Steps - who do you need to involve internally and/or gain input or approval from prior to customer interaction? (i.e. Leader, Sales, Risk, Underwriting, Pricing, Supplier Enablement, Spend IQ, Consulting, etc) What will do what by when?

TRANSITION: Now that we have reviewed each step, lets focus in on "Linking the Solution" and some key considerations.

LINKING YOUR B2B SOLUTION

Corporate Purchasing Card (CPC)
Traditional Card-based vehicle for consolidating high volume/ low dollar purchases; front & back end controls.

WALKING PLASTIC

vPayment
Virtual payment solution that assigns a single-use account number to each transaction. Enables users to set specific payment amount, date range, and transaction details to help control spend and facilitate reconciliation processes.

INTEGRATED PAYMENT

Buyer Initiated Payments (BIP)
An electronic payment method that enables users to leverage their American Express billing cycle to extend payment terms with suppliers.

WORKING CAPITAL

WHO product is for:

- Customer Profile
- Key Stakeholders Needs & Aspirations
- Customer Readiness
- Customer ROI

WHAT the Product does:

- Product Overview

HOW to Sell:

- Objection Handling
- Implementation Requirements & Constraints



16

FACILITATOR: Bonni

SAY: there are key considerations when linking your B2B solution. These include:

WHO product is for:

- Customer Profile
- Key Stakeholders Needs & Aspirations
- Customer Readiness
- Customer ROI

WHAT the Product does:

- Product Overview

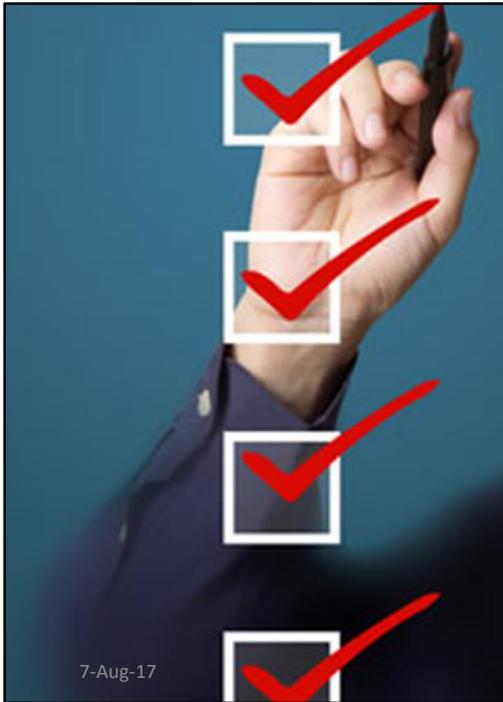
HOW to Sell:

- Objection Handling
- Implementation Requirements & Constraints

EXPLAIN: *B2B Product Minis videos* to be made available post training to help you address these key considerations by product. You will learn more on an upcoming ON AIR session.

Product videos covered include:

1. Corporate Purchasing Card
2. vPayment
3. Buyer Initiated Payments
4. FXIP / AccessLine
5. Enhanced BTA
6. Working Capital Terms
7. Merchant Financing



BEST PRACTICES

For Preparing to Make Your Recommendation

- **Know Your Customer:** Secure cross functional buy-in and engagement by the customer and tailor your approach and messages to each stakeholder
- At a minimum **get a strong advocate** to assist in securing a cross functional team
- Ask for a **spend file** to identify opportunity and quantify the return on investment
- Consult with the relevant **Amex internal colleagues** (Spend IQ, Sales, Leadership, Business Solutions Team, etc.)

7-Aug-17 17

FACILITATOR: Bonni

REVIEW slide.

TRANSITION: Now that we have reviewed steps and best practices for preparing to meet with your customer and make your recommendation, lets hear some stories from those in the field that successfully prepared to meet with their customer to get the win!



SUCCESS STORIES: Preparing Your Recommendation



Review best practices for preparing to make your recommendation:

- *Review research and analysis strategies*
- *Describe solutions identified and rationale*
- *Describe how customer readiness was determined*



TIME: 5 MINUTES PER SPEAKER

18



CONDUCT GROUP ACTIVITY

FACILITATOR: Ted

GROUP ACTIVITY- SHOW ME: "Champion Success Story: Preparing Your Recommendation"

FACILITATOR NOTES

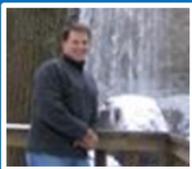


MEETING PREPARATION: HOSPITAL CORP OF AMERICA

Industry: US Healthcare & Education Vertical



Shawn M Thomas
Director, Account Development
Large Market



Gene Hullender
Manager, Account Development
LARGE MARKET

HCA

Hospital Corporation of America™

DEAL BACKGROUND

One of the nation's leading providers of healthcare services, HCA is made up of locally managed facilities that include 174 hospitals and 119 freestanding surgery centers located in 20 U.S. states and in the United Kingdom. A Pcard client since 1999, they have a suite of Amex programs in BIP (\$1.2B R12), CPC (\$152MM), and CC (\$105MM).

ANNUAL REVENUE: \$42 BILLION

POINT OF DEPARTURE:

- Revenue share was imperative as well as a need for cash flow management
- Strong desire for automation, process efficiency, and reduction of checks

POINT OF ARRIVAL:

- \$280MM in incremental CV for HCA's BIP program and 40% overall YOY program growth
- More OTB capacity for strategic supplier growth
- Top 5 AXP client globally

FACILITATOR: Shawn & Gene

DO: Provide brief description of Customer and background for this deal.

FACILITATOR NOTES



MEETING PREP: BEST PRACTICES & OUTCOMES

HOSPITAL CORPORATION OF AMERICA (HCA)

RESEARCH & ANALYSIS

We wanted to quantify the value of the form of payment between HCA and the supplier (GE) with BIP. Because the overall GE relationship was +\$320MM, we needed to review the payment history by vendor ID to understand what was being purchased, which division payments were going to, and how quickly the supplier was getting paid. We also did industry research to identify the cost of money as well as the cost of checks and reconciliation.

SOLUTION IDENTIFIED AND WHY

Our intent was to position BIP as the advantageous form of payment for both HCA and GE. Not only would it help HCA significantly build their program, but BIP would help the supplier with a significant number of check payments from multiple HCA locations. It would however require custom pricing with both GMS and GCP as well as an increase in the OTB.

CUSTOMER READINESS

The customer preferred BIP overall as a form of payment but hadn't seen acceptance from strategic suppliers. It would require having AP as well as Purchasing involved in the conversations and it would also require HCA to have a custom incentive carve out just for the GE spend.

20



This slide is animated.

FACILITATOR: Shawn & Gene

DESCRIBE:

PREPARATION

- What preparation / research / analysis did you do to inform your recommendation?
- What solution(s) did you identify? Why?
- How did you determine the customer's readiness for the recommendation?

PREPARATION/RESEARCH/ANALYSIS

We wanted to quantify the value of the form of payment between HCA and the supplier (GE) with BIP. Because the overall GE relationship was +\$320MM, we needed to review the payment history by vendor ID to understand what was being purchased, which division payments were going to, and how quickly the supplier was getting paid. We also did industry research to identify the cost of money as well as the cost of checks and reconciliation.

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MEETING PREPARATION: CENTENE CORPORATION

Industry: Healthcare



**Marla
Lopez**

LARGE MARKET
Manager of
Account
Development,
West Region

CENTENE[®]
Corporation

DEAL BACKGROUND

Diversified healthcare enterprise that provides programs and services to government sponsored healthcare programs; specialty services including behavioral health, care management software, in-home health services, life and health management, managed vision, pharmacy benefits management, specialty pharmacy and telehealth services.

ANNUAL REVENUE: \$41B, Long term T&E client (\$70M), B2B client since 2016 (\$95M)

POINT OF DEPARTURE

- High desire to streamline processes
- Need to control costs through process efficiencies
- Reconciliation issues with competitor single use program
- Historically, not interested in Amex B2B due to lack of resources and competing priorities, ERP conversion and M&A activity

21

FACILITATOR: Marla

DO: Provide brief description of Customer and background for this deal.

FACILITATOR NOTES



MEETING PREP: BEST PRACTICES & OUTCOMES

CENTENE CORPORATION

RESEARCH & ANALYSIS

- Listened to earnings calls, reviewed 10Q and 10K reports, read Industry publications, researched industry trends, and asked probing questions in quarterly T&E BPR's- priorities were to grow revenues and control costs through streamlining processes & improved process efficiencies.
- Ensured Treasury, CFO, A/P, Procurement and Finance at table when discussing B2B matters and during strategic business partner reviews.
- Received Spend file and worked with Amex internal team to identify best fit suppliers and payment strategy based on previous discussions with key constituencies.

SOLUTION IDENTIFIED AND WHY

Based on previous research and meetings, we had been told that client was not interested in Amex vPay (used Treasury bank single use payment solution), walking plastic, or AP/supplier Card. Based on this we identified BIP as the best solution to meet their needs/goals and readiness.

CUSTOMER READINESS

Historically, client engaged in multiple M & A activities and ERP conversion and was not willing to seriously discuss Amex B2B payment solutions/strategies. They had significant revenue growth and became re-focused on controlling costs and streamlining processes and were more motivated to look at ways to do this. At that point, (May 2015), they provided Amex a spend file.

22



This slide is animated.

FACILITATOR: Marla

DESCRIBE:

PREPARATION

- What preparation / research / analysis did you do to inform your recommendation?
- What solution did you identify? Why?
- How did you determine the customer's readiness for the recommendation?

PREPARATION/RESEARCH/ANALYSIS

Listened to quarterly and year-end earnings calls, reviewed 10Q and 10K reports, read Industry publications, researched industry trends, and asked probing questions in quarterly T & E BPR's. Their top primary business priorities were to grow revenues and control costs through streamlining processes & improved process efficiencies. Ensured Treasury, CFO, A/P, Procurement and Finance at the table when discussing B2B matters and during strategic business partner reviews. Received Spend file and worked with Amex internal team to identify best fit suppliers and payment strategy based on previous discussions with key constituencies.

SOLUTION IDENTIFIED AND WHY

Based on previous research and meetings, we had been told that client was not interested in Amex vPay (used Treasury bank single use payment solution), walking plastic, or AP/supplier Card. Based on this we identified BIP as the best solution to meet their needs/goals and readiness.

CUSTOMER READINESS

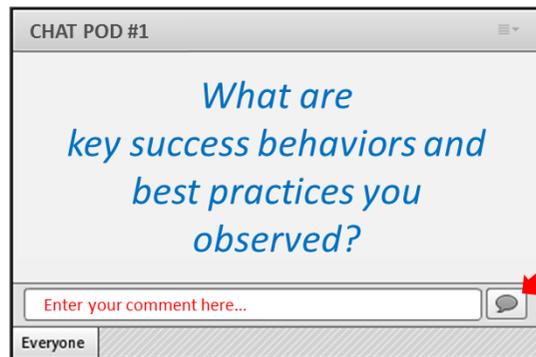
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WRAP UP:

Preparing to Make the Recommendation

Using the **Chat Feature**, type in the answers for the following questions:



23



CONDUCT GROUP ACTIVITY (TED)



PREPARATION:

- Set up Chat Pod for the below question:
 1. *What are the key success behaviors an best practices you observed?*

DO: Champions share their best practices and real outcomes from the discussion.



The Meeting: Making Your Recommendation

- **Structuring** the Meeting
- Overcoming **Obstacles & Objections**
- **Success Behaviors:** Marking the Recommendation
- **SHOW ME:** Champion Success Stories: CASE STUDIES & ROLE PLAY

FACILITATOR: Ted

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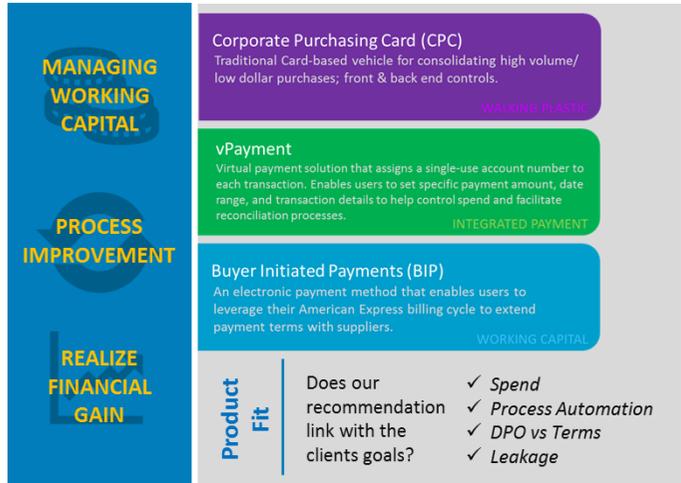
FACILITATOR NOTES

STRUCTURING THE MEETING

FORMAL PRESENTATION & SALES PITCH

- Introductions
- Outline/Confirm Company Goals
- Present Findings & Recommendation
- Communicate ROI
- Gain Agreement

POSITIONING B2B OPPORTUNITY



25

FACILITATOR: Bonni

DISCUSS best practices for structing a customer meeting and key considerations for positioning solutions during the conversation.

FACILITATOR NOTES



FACILITATOR: Ted



DEVELOPMENT NOTE: Set up CHAT PODS in Adobe Connect



ACTIVITY: CHAT GROUP ACTIVITY

ASK: What are some strategies for upcoming these following objections?

SET UP: Build 2-3 Chat Pods- with typical objections:

OBJ 1: "We already are using one of our banking partners programs for indirect spend."

Many organizations have partnerships with their banks and those treasury relationships are important. We have found with our clients, that our solutions don't have to replace your existing relationships. A model of co-existence with multiple payment strategies seems to be a very effective approach in driving process efficiencies and hard dollar savings on that spend.

OBJ 2: "We have a lot of important initiatives and priorities we are working on and just don't have the resources and time to pursue these discussions right now."

We certainly understand this, the goal would be to drive significant value back to your company. Automation and improved efficiency are top of mind for many organizations. We can provide a substantial ROI to your company in terms of payment automation, increased cash flow and a revenue stream via an incentive on this spend. Because this is our core business, we provide extensive resources in both implementing the program and on-boarding the suppliers. We could provide you an analysis of your spend file with tangible recommendations and a ROI on this. You may find it is well worth the minimal engagement your teams would have to invest in this initiative, and it could yield very substantial value.

OBJ 3: "Our suppliers are not going to want to pay a fee, or they might even try to pass this extra cost back to us."

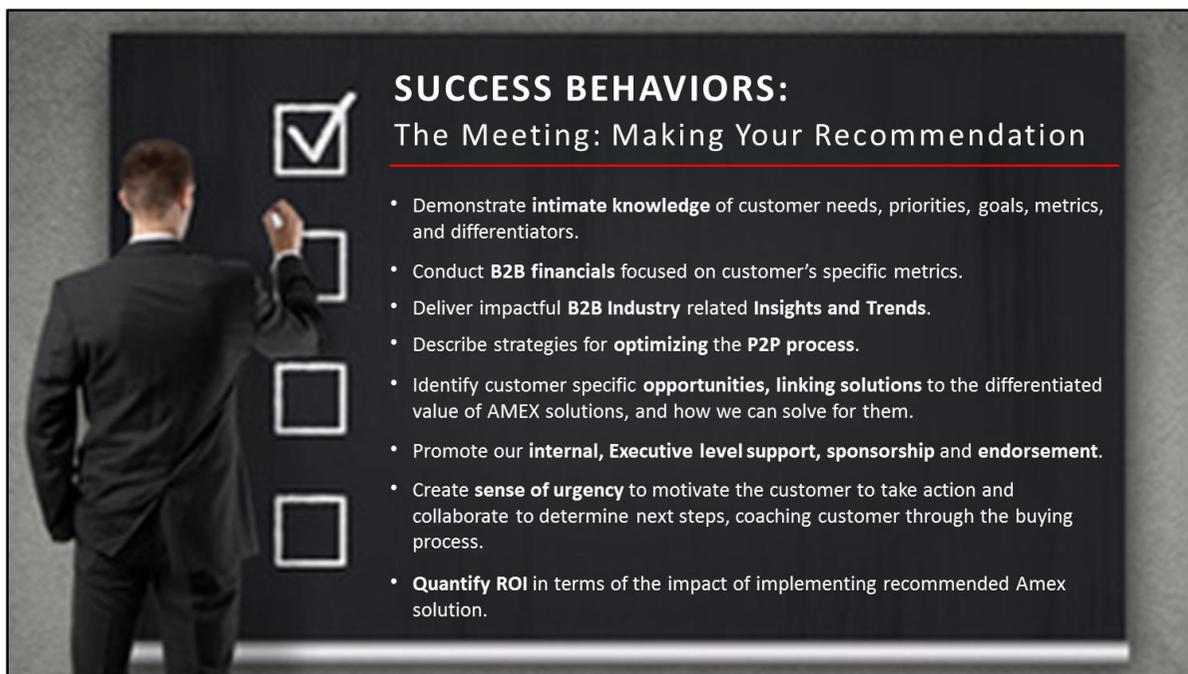
Actually we've had very good success with suppliers participating in our programs. Just as there is a value story for you, the suppliers can also receive benefits that are important to them like getting paid sooner which positively impacts their DSO, they have improved process efficiencies since they aren't chasing their receivables, and they can receive reconciliation data. We would certainly partner with you on supplier on-boarding and communication strategies to maximize the program for both you and your suppliers.

EXTRA- OBJ 4: "We are receiving a much larger incentive offering from your competitors."

Thank you for sharing that feedback. We have found that our programs are generally at least a third larger than competitive programs because of our direct merchant relationships which lead to increased success in on-boarding your suppliers and the vast amount of resources we will bring to the table which means we are doing the "heavy lifting". So while our incentive appears "smaller", in the end we have larger programs which result in a larger incentive payout – not to mention the increased automation and DPO savings. I could put you in touch with one of my clients that could attest to this if you would like.

DO: Have participants type in how they would prep for each customer type.

TRANSITION: Next slides discuss Success Behaviors.

**FACILITATOR: Bonni****REVIEW Best Practices:**

- Opened discussion with focus on the client, their priorities, needs, goals (led TO not WITH Amex.)
- Demonstrated intimate knowledge of the client, their goals, metrics, and differentiators (details re. AP, procurement, finance, treasury.)
- Addressed the specific stakeholders and their needs, goals and priorities.
- Conducted a B2B financials conversation focused on client specific metrics.
- Delivered impactful B2B industry related INSIGHTS and trends.
- Used best practice examples of what other customers have done to apply INSIGHTS.
- Described strategies for optimizing the P2P process.
- Conducted a dialogue, asking collaborative, open-ended, thoughtful questions to deepen understanding of the client's situation with follow-up probing questions. For example asked questions exploring:
 - *Clients' current P2P process, payment terms and methods, ERP approval flow?*
 - *What suppliers are burdening the AP process?*
 - *What the client is doing currently with vendor payments, e-payables, supply chain financing?*
 - *What scorecard metrics they have as targets around working capital, DPO and incentives?*
- Existing Customers:
 - *Is our value prop directly in line with the stated goals for our partnership?*
 - *Have our results to date been meeting/exceeding agreed to expectations?*
 - *Are our successes being syndicated across their organization?*
- Identified client specific opportunities, linking solutions to the differentiated value of Amex products and solutions, and how we can solve for them. (Positioned Amex B2B products as matching up to client specific needs and Working Capital needs.)
- Demonstrated that we have internal, Executive level support, sponsorship and endorsement
- Demonstrated composure, confidence and competence in conducting conversations (not hiding behind a deck nor acting lost when talking financials, didn't get flustered, etc.)
- Created a sense of urgency to motivate the client to take action and collaborated with customer to determine next steps, coaching customer through the buying process.
- Quantified ROI in terms of the impact of implementing recommended Amex solution.
- Acknowledged and deferred price requests, re-directing focus on the value we bring, agreeing to concessions only in exchange for the customer giving something in return.



SUCCESS STORIES:

The Meeting: Making Your Recommendation



Review best practices conducting the meeting & making your recommendation:

- *Champion describes meeting with key stakeholder(s)*
- *Share success behaviors & best practices*



TIME: 8 MINUTES PER SPEAKER

28



CONDUCT GROUP ACTIVITY

FACILITATOR: Ted

GROUP ACTIVITY- SHOW ME: “Champion Success Story: The Meeting: Making the Recommendation”



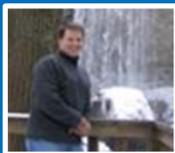
THE MEETING: HOSPITAL CORPORATION OF AMERICA

Industry: US Healthcare & Education Vertical



Shawn M Thomas

Director, Account Development
LARGE MARKET



Gene Hullender

Manager, Account Development
LARGE MARKET



GCP AD, GCP BD, GMS

HOSP CORP OF AMERICA

DEAL BACKGROUND

One of the nation's leading providers of healthcare services, HCA is made up of locally managed facilities that include 174 hospitals and 119 freestanding surgery centers located in 20 U.S. states and in the United Kingdom. A Pcard client since 1999, they have a suite of Amex programs in BIP (\$1.2B R12), CPC (\$152MM), and CC (\$105MM).

ANNUAL REVENUE: \$42 BILLION

POINT OF DEPARTURE:

- Revenue share was imperative as well as a need for cash flow management
- Strong desire for automation, process efficiency, and reduction of checks

POINT OF ARRIVAL:

- \$280MM in incremental CV for HCA's BIP program and 40% overall YOY program growth
- More OTB capacity for strategic supplier growth
- Top 5 AXP client globally

OBSTACLES TO OVERCOME

- Issues enrolling all GE divisions due to certain payment terms and processes.
- Supplier only wanted certain lines of business involved
- Some vendor ID's/Divisions that HCA did not want enrolled in BIP because of an automated billing process.

29

FACILITATOR: Shawn & Gene

GROUP ACTIVITY- SHOW ME: "Champion Success Story: The Meeting: Making the Recommendation"

DO:

- Remind participants of "Deal Background".
- Discuss Meeting Set Up: discuss how you got the meeting and circumstances leading up to meeting:
 - Who are you meeting with?
 - How did you get the meeting?
 - What were the circumstances?
 - What were the hurdles?

FOCUS on "Obstacles to Overcome"- what hurdles/objections do you anticipate having to deal with.



THE MEETING: HOSPITAL CORPORATION OF AMERICA

Industry: US Healthcare & Education Vertical

Supplier Name	Client Supplier ID	Total Spend	Payment Method	BIP Status
GE HEALTHCARE FINANCIAL SERVICES	902884	\$71,801,261	PayMode	EXCLUDED
GE HEALTHCARE (EQUIP&ACC)	902900	\$34,867,002	PayMode	ENROLLED
GE MED SYSTEMS INFO TECH (EQUIPMT)	953600	\$27,445,443	PayMode	ENROLLED
GE MED SYSTEMS INFO TECH (ACC&SUP)	942000	\$23,914,080	PayMode	ENROLLED
GE HEALTHCARE IITS USA CORP	900371	\$13,045,085	PayMode	ENROLLED
GE HEALTHCARE (ULTRASOUND&PCD)	921256	\$12,873,181	Check	ENROLLED
DATEX OHMEDA INC	904100	\$10,870,937	PayMode	ENROLLED
GE HEALTHCARE-OEC	968700	\$7,066,132	Check	ENROLLED
GE HEALTHCARE CLINICAL SVC	945915	\$4,243,893	Check	ENROLLED
GE HEALTHCARE (MEDI-PHYSICS)	997586	\$3,817,171	Check	ENROLLED
GE HEALTHCARE DI SVC (TIME&MATER)	921727	\$1,271,167	Check	ENROLLED

You can see our final results as of today after much collaboration between GCP AD and Sales, HCA, and GE:

- \$139MM enrolled PCV through this year with Financial Services the lone exception
- 79% of the captured volume came from a competitor program

30

FACILITATOR: Shawn & Gene

SHARE sample meeting collateral.

EXPLAIN:

This table shows how we had to coordinate between HPG (HCA’s Supply Chain) and supplier GE to identify the vendor master divisions that comprised the 2nd phase of opportunities and were able to get most of these on despite a large portion being on a competitor program called PayMode.

- The vendor numbers highlighted in TEAL are the ones per HPG that were OK’d to pursue initially.
- However, HPG said GE could request the ones in YELLOW to be moved to BIP if they choose to.

FACILITATOR NOTES

MEETING BEST PRACTICES & OUTCOMES

HOSPITAL CORPORATION OF AMERICA

CONVERSATION STRUCTURE

- Outlined what their interests were in the BIP program.
- Positioned benefits of leveraging BIP with this type of strategic supplier to help meeting organization's goals.
- Recommended hosting conversations with GE to understand each other's goals and how process would work.

OUTCOME & IMPLEMENTATION

- HCA and GE held conversations to discuss how the HCA vendor in scope. In total over \$280MM in spend was onboarded onto BIP.
- It was imperative to coordinate with GMS and B2B Dev to ensure IDs and GE divisions aligned with the capital purchase limitation.
- Initially HCA and GE agreed to \$160MM in enrollments and excluded \$180MM in GE Divisional Spend. We were then able to have discussions with key decision makers to get an additional \$120MM e a smooth enrollment process and monitoring the payment and reconciliation process.
- Risk agreed to a two-phase OTB increase- HCA did a mid cycle payment which helped reinforce Risk to implement the 2nd OTB increase as a fast-follower and thus allow for the additional \$120MM onboarding.

SUCCESS FACTORS

- Strong AXP alignment between GCP AD and BD, as well as GMS Client Management and B2B Development
- Solid planning and execution which relied on a thorough understand of all parties needs and processes as well as quantifiable value we could tie back to all the parties needs.

31



This slide is animated.

FACILITATOR: Shawn & Gene

<p>CUSTOMER CONVERSATION</p> <ul style="list-style-type: none"> How did you structure the conversation to address the customer's needs? What obstacles or objections, if any, stood in the way of closing this opportunity? How did you surmount these issues? 	<p>CONVERSATION STRUCTURE</p> <p>We started by holding a conversation with HCA to outline what their interests were in the BIP program. Once they articulated certain needs of the program we positioned the benefits of leveraging BIP with this type of strategic supplier to help them meet their organization's goals. We also recommended that HCA hosts conversations with GE to understand each other's goals and discuss how the process would work. Because our BD partners had deep relationships within GE, they were critical on facilitating these conversations. BD was able to partner with GMS in meetings with the merchant to establish the value prop and be the customer voice in order to reinforce program benefits and our client's request.</p> <p>OBSTACLES TO OVERCOME</p> <ul style="list-style-type: none"> Because HCA has a standalone supply chain organization, there were some issues with enrolling all GE divisions because of certain payment terms and processes. In addition, the supplier only wanted certain lines of business involved because any capital purchases had too small margins to be considered in scope. It was noted that because of the size of the supplier relationship, it would be necessary to open a case with the Risk team to support increasing the OTB. Also due to the volume, it would require custom pricing with both GMS and GCP. GMS and GCP hadn't really worked together on such a custom deal before so it was critical to make sure that all stakeholders were internally aligned as well as full pricing and profitability impacts were understood. There were some vendor ID's/Divisions that HCA did not want enrolled in BIP because of an automated billing process.
<p>OUTCOME</p> <ul style="list-style-type: none"> What was the outcome? What did you do once the customer agreed to the solution (how did you implement the solution)? 	<p>OUTCOME & IMPLEMENTATION</p> <ul style="list-style-type: none"> HCA and GE held conversations to discuss how the HCA vendor IDs and GE divisions aligned with the capital purchase limitation. It was also critical that HCA strongly endorsed the program. Because the conversation was a joint effort between GMS and GCP, the consistent and concise messaging enforced the validity of the analysis and value of BIP to all parties. Initially HCA and GE agreed to \$160MM in enrollments and excluded \$180MM in GE Divisional Spend. We were then able to have discussions with the key decision makers to get an additional \$120MM in scope. In total over \$280MM in spend was onboarded onto BIP. It was imperative to coordinate with GMS and B2B Dev to ensure a smooth enrollment process and monitoring the payment and reconciliation process. Since Risk agreed to do a two-phase OTB increase, it would be necessary to provide Risk with supplier spend data to support an increase in OTB as well as performing weekly @work and FDS reporting to monitor OTB. Proactively we had to encourage HCA to prepare for mid cycle payments to maintain spending patterns during ramp-up and the first OTB phase. When we saw they were quickly closing in on their OTB the first month, HCA did a mid cycle payment which helped reinforce Risk to implement the 2nd OTB increase as a fast-follower and thus allow for the additional \$120MM onboarding.
<p>LEARNINGS</p> <ul style="list-style-type: none"> What were the two success factors that contributed to closing the business? What would you change or do differently (watchouts)? What guidance / best practices would you share with a peer in selling in this solution? (getting a spend file, etc.) 	<p>TOP TWO SUCCESS FACTORS</p> <ul style="list-style-type: none"> Strong AXP alignment between GCP AD and BD, as well as GMS Client Management and B2B Development Solid planning and execution which relied on a thorough understand of all parties needs and processes as well as quantifiable value we could tie back to all the parties needs. <p>WHAT I WOULD DO DIFFERENTLY</p> <ul style="list-style-type: none"> More internal project management. We did find a few times where we did not have full internal alignment on what vendor ID's were in scope and which weren't. <p>BEST PRACTICES</p> <ul style="list-style-type: none"> Developing a strategy in coordination with all AXP business partners (GCP, GMS, Pricing, etc). Digging into the processes and relationships and not being afraid to ask as many questions as necessary to fully understand the business impact to all parties

FACILITATOR NOTES



THE MEETING: CENTENE CORPORATION

Industry: Healthcare



**Marla B.
Lopez**

LARGE MARKET
Manager of
Account
Development,
West Region



**CFO, Treasurer,
Procurement,
Finance, AP**

**CENTENE
CORPORATION**

DEAL BACKGROUND

Diversified healthcare enterprise that provides programs and services to government sponsored healthcare programs; specialty services including behavioral health, care management software, in-home health services, life and health management, managed vision, pharmacy benefits management, specialty pharmacy and telehealth services.

ANNUAL REVENUE: \$41B, Long term T & E client (\$70M), B2B client since 2016 (\$95M)

POINT OF DEPARTURE:

- High desire to streamline processes
- Need to control costs through process efficiencies
- Reconciliation issues with competitor single use program
- Historically, not interested in Amex B2B due to lack of resources and competing priorities, ERP conversion and M & A activity

OBSTACLES TO OVERCOME

- Competing Treasury Bank virtual payments program in place.
- Client expected larger basis point incentive return.
- Resource constraints due to large acquisition.

32

FACILITATOR: Marla

GROUP ACTIVITY- SHOW ME: “Champion Success Story: The Meeting: Making the Recommendation”

DO:

- Remind participants of “Deal Background”.
- Discuss Meeting Set Up: discuss how you got the meeting and circumstances leading up to meeting:
 - Who are you meeting with?
 - How did you get the meeting?
 - What were the circumstances?
 - What were the hurdles?

FOCUS on “Obstacles to Overcome”- what hurdles/objections do you anticipate having to deal with.

MEETING BEST PRACTICES & OUTCOMES
CENTENE CORPORATION

CONVERSATION STRUCTURE

- Presented Spend IQ results and validated each key stakeholder's needs/goals from previous discussions.
- Positioned BIP as a "push" co-existing program with current treasury bank solution which made treasury feel less threatened.
- Provided compelling ROI showing check elimination savings, float savings opportunity using WACC from Guru Focus, and illustrative incentive return program.

OUTCOME & IMPLEMENTATION

- Presented Spend IQ in June 2015, multiple meetings July – September, verbal agreement and SET engaged by October. Executed agreement in November 2015 with \$5M in spend during first billing month of February 2016. Current annual run rate of \$95M.
- Uncovered reconciliation issues with virtual pay provider, BIP push solution solved for that. We flipped that \$24M to BIP and delivered an overall B2B program that was almost 4X larger than competitor due to AMEX resources and closed loop network.

SUCCESS FACTORS

- By building relationships with all key constituencies at the onset, INCLUDING TREASURY, we were able to clearly understand unique needs and motivations of each of the key stakeholders and deliver a compelling value story for each of them.
- Provided compelling ROI and payment strategy based on client's goals and pain points.

33



This slide is animated.

Facilitator: Marla

CUSTOMER CONVERSATION

- How did you structure the conversation to address the customer's needs?
- What obstacles or objections, if any, stood in the way of closing this opportunity? How did you surmount these issues?

CONVERSATION STRUCTURE

- Presented Spend IQ results with Centene and validated each of the key stakeholder's needs/goals from previous discussions. AP wanted to reduce checks and was looking for a push solution. Treasury wanted AP process improvement; holding onto cash longer; and unsecured line of credit. CFO wanted new revenue stream and process efficiencies. Procurement wanted incentive return, payment automation, and extension of supplier payment terms
- Positioned BIP as a "push" co-existing program with current treasury bank solution which made treasury feel less threatened
- Provided compelling ROI showing check elimination savings (cost of check taken from TAPN disbursement benchmark survey), float savings opportunity using WACC from Guru Focus, and illustrative incentive return program

OBSTACLES TO OVERCOME

- Competing Treasury Bank virtual payments program in place:
 - Through our discussions, client understood they could have a truly push system that could support their payments which would eliminate the reconciliation issues they were having with current single use provider.
- Client expected larger basis point incentive return:
 - We were able to show how Amex closed loop network would enable a larger program and that Amex would do the "heavy lifting" in onboarding suppliers. This would result in larger program spend leading to larger incentive.

OUTCOME

- What was the outcome?
- What did you do once the customer agreed to the solution (how did you implement the solution)?

OUTCOME AND IMPLEMENTATION

- Presented Spend IQ in June 2015, multiple meetings July – September, verbal agreement and SET engaged by October. Executed agreement in November 2015 with \$5M in spend during first billing month of February 2016. Current annual run rate of \$95M
- During Spend IQ meeting, uncovered that there were reconciliation issues with their virtual pay provider, BIP push solution solved for that so we flipped that \$24M to BIP and delivered an overall B2B program that was almost 4 times larger than the competitor due to Amex resources and closed loop network

LEARNINGS

- What were the two success factors that contributed to closing the business?
- What would you change or do differently (watchouts)?
- What guidance / best practices would you share with a peer in selling in this solution? (getting a spend file, etc.)

TOP TWO SUCCESS FACTORS

- By building relationships with all key constituencies at the onset, INCLUDING TREASURY, we were able to clearly understand the unique needs and motivations of each of the key stakeholders and deliver a compelling value story for each of them
- Provided compelling ROI and payment strategy based on client's goals and pain points

WHAT I WOULD DO DIFFERENTLY

- VP of procurement heavily engaged in meetings and implementation, but most of his team was not. At the beginning of the program, we ran into some "bumps" when a supplier would call their Purchasing contact and that contact was not as strong in their endorsement. Since then, VP has made sure all of Purchasing understands the importance of this initiative

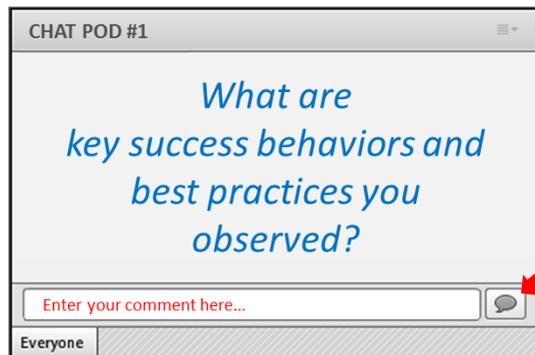
FACILITATOR NOTES



WRAP UP:

The Meeting: Making Your Recommendation

Using the **Chat Feature**, type in the answers for the following questions:



34



CONDUCT GROUP ACTIVITY (TED)



PREPARATION:

- Set up Chat Pod for the below question:
 1. *What are the key success behaviors an best practices you observed?*

DO: Champions share their best practices and real outcomes from the discussion.



ROLE PLAY: THE RECOMMENDATION

CENTENE[®] Corporation

- **MEETING SET UP:** Follow-up meeting after presenting spend file results.
- **GOAL:** Positioning of BIP and showing ROI that addresses stakeholder needs.
- **OBSTACLES:** Competing treasury bank virtual payments program in place, knew competitive program had "rich" incentive, client working on its largest acquisition integration.



Marla Lopez
as the
**AMEX AD
MANAGER**



Bonni J. Koerner
as the
**TREASURER
CENTENE CORP**

35

FACILITATOR: Ted, Marla, Bonni



CONDUCT GROUP ACTIVITY: THE ROLE PLAY: THE RECOMMENDATION

- *Interaction between a Customer and an AMEX Representative*
- *Demonstrate behaviors and best practices for conducting a customer conversation*
- *Demonstrate key strategies for positioning a B2B solution*



PREPARATION: Set up Chat Pod for the below question:

1. How did the MAD position B2B Solutions effectively?
2. What are other areas of opportunity for positioning B2B Solutions.

INSTRUCT participants to enter in observations into chat pods as the role play is conducted.

ROLE PLAY: Centene Corporation

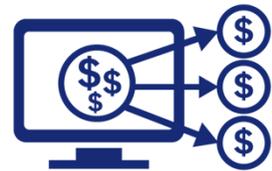
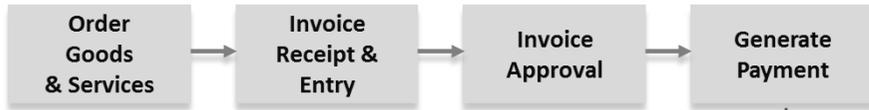
- **Scenario:** The setting is follow-up meeting after presenting spend file results. Intent is positioning of BIP and showing ROI that addresses stakeholder needs.
- **Hurdles:** Competing treasury bank virtual payments program in place, knew competitive program had "rich" incentive, client working on its largest acquisition integration.
- **Keys to Success:** Engaged all key shareholders including treasury to understand unique needs/goals. Provide compelling ROI and payment strategy based on each stakeholder's goals/pain points.



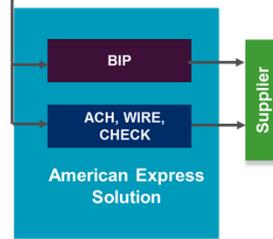
ROLE PLAY: THE INTERACTION

BIP FUNCTIONALITY

CURRENT PROCUREMENT AND PAYABLES PROCESS:



- Use current workflow – no parallel systems
- NACHA file and other layouts work with most ERPs
- Follow existing policies – no process change management
- American Express processes the transaction on behalf of the supplier and deposits funds directly into their account
- Full remittance information is sent to the supplier
- Allows for payment to suppliers with multiple remit to locations and departments



Key Differentiators: true push payments, easy reconciliation process that minimizes errors and American Express manages the supplier on boarding process.

FACILITATOR: Marla

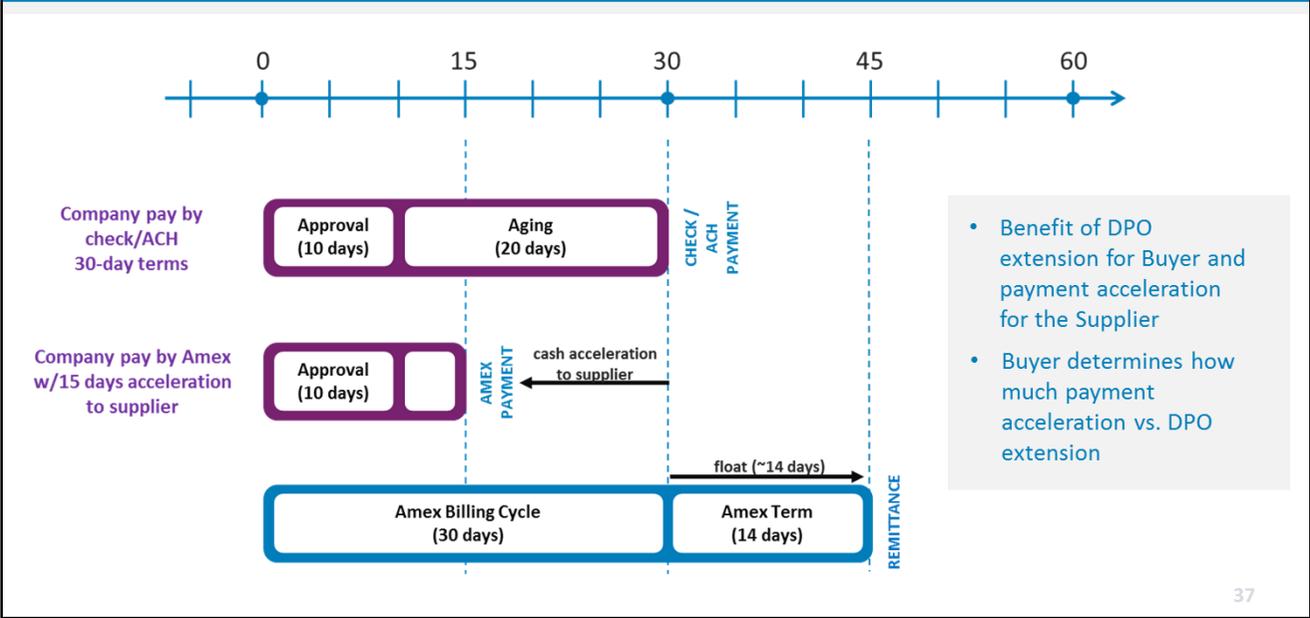
SHARE sample meeting collateral.

FACILITATOR NOTES



ROLE PLAY: THE INTERACTION

WORKING CAPITAL FLEXIBILITY WITH B2B PAYMENTS



37

FACILITATOR: Marla

SHARE sample meeting collateral.

FACILITATOR NOTES



ROLE PLAY: THE INTERACTION

POSITIONING ROI

Centene Illustrative Financial Incentive Calculator for B2B Spend

FINANCIAL ADVANTAGE of American Express						Totals
American Express	1ST YEAR	2nd YEAR	3rd YEAR	4th YEAR	5th YEAR	
TIERED VOLUME REBATE INCENTIVE						
Total Charge Volume(CV)	\$60,000,000	\$70,000,000	\$80,000,000	\$90,000,000	\$100,000,000	
CV Tiered Incentive for trx \$0-\$7,500 ----> Est. 30% of volume	\$18,000,000	\$21,000,000	\$24,000,000	\$27,000,000	\$30,000,000	
CV Tiered Incentive for trx \$7,500+ ----> Est. 70% of volume	\$42,000,000	\$49,000,000	\$56,000,000	\$63,000,000	\$70,000,000	
Rebate on Charge Volume \$0-\$7,500	110	110	115	115	120	
Rebate on Charge Volume \$7,500+	35	35	45	45	50	
TOTAL VOLUME REBATE	\$345,000	\$402,500	\$528,000	\$594,000	\$710,000	\$2,579,500
FLOAT SAVINGS						
Charge Volume	\$60,000,000	\$70,000,000	\$80,000,000	\$90,000,000	\$100,000,000	
Interest Rate (based on current WACC)	7.63%	7.63%	7.63%	7.63%	7.63%	
Days Extension of DPO	14	14	14	14	14	
TOTAL FLOAT SAVINGS	\$175,595	\$204,860	\$234,126	\$263,392	\$292,658	\$1,170,630
CHECK ELIMINATION SAVINGS						
Number of Checks	6,000	6,000	6,000	6,000	6,000	
Cost per Check	\$6.52	\$6.52	\$6.52	\$6.52	\$6.52	
TOTAL CHECK ELIMINATION SAVINGS	\$39,120	\$39,120	\$39,120	\$39,120	\$39,120	\$195,600
NET TOTAL	\$559,715	\$646,480	\$801,246	\$896,512	\$1,006,778	
FINANCIAL BENEFIT OVER LIFE OF AGREEMENT						\$3,945,730

38

FACILITATOR: Marla

SHARE sample meeting collateral.

FACILITATOR NOTES



ROLE PLAY: DEBRIEF

BEST PRACTICES



- ✓ **Fully Engaged Multiple Constituencies:** Executive Level sponsorship - CFO, Treasury, Finance, Procurement, and Accounts Payable. Tailor message to each stakeholder as they had different goals and needs.
- ✓ **Probed and Validated** what is of value to each stakeholder, don't assume it.
- ✓ **Cultivated a Strong Relationship** with Treasury as T&E client, ensured attendance at client meetings.
- ✓ **Positioned AMEX B2B Solutions** as a complement to their pre-existing virtual payment program (understanding Treasury's resistance to dropping partnership with a competing program).
- ✓ **Presented Compelling ROI** and value of implementing AMEX B2B Solutions.
- ✓ **Utilized Subject Matter Experts (SMEs)** in supporting the process: Sales, Supplier Enablement, Spend IQ team, Business Solutions team, B2B Expansion Strategy Team.
- ✓ Secured updated **spend files**, still conducting **weekly calls**.

41

Facilitator: Marla

DO: Champion summarizes their best practices.

BEST PRACTICES

- Fully engaged multiple constituencies: Executive Level sponsorship - CFO, Treasury, Finance, Procurement, and Accounts Payable. Tailor message to each stakeholder as they had different goals and needs.
- Probe and Validate what is of value to each stakeholder, don't assume it
- Cultivated a strong relationship with Treasury as T & E client, ensured attendance at client meetings
- Positioned BIP as a complement to their pre-existing virtual payment program (understanding Treasury's resistance to dropping partnership with a competing program)
- Presented compelling ROI and value of implementing BIP
- Utilized subject matter experts in supporting the process: Sales, Supplier Enablement, Spend IQ team, Business Solutions team
- Secure updated spend files, still conducting weekly calls



WRAP UP: ROLE PLAY

The Meeting: Making Your Recommendation



1. How did the MAD position B2B Solutions effectively?
2. What are other areas of opportunity for positioning B2B Solutions.

40



DEBRIEF GROUP ACTIVITY (TED)

NOTE:

You are to conduct the GROUP DEBRIEF activity. This is to close out the activity as a group and mine for key take-aways and “ah-ha” moments.



HANDOUT: Centene Role Play Answer Key



BEST PRACTICE FOR DEBRIEFING LEARNER RESPONSES:

- ✓ As Champions/Facilitators, allow for the Participants to speak first.
- ✓ Be sure to probe for meaning, clarification and further insight as to what they have learned and or still have questions on.
- ✓ Once participants have share, then you should share your thoughts and the key take-aways you want them to walk away with.



Putting It All Together

- Summary of **Key Learning**
- Upcoming **Learning Opportunities**
- **Action Planning**

FACILITATOR: Ted

Topic	Champions/Speakers	Pages	Minutes
Intro & Welcome	Ted, Kristi, Eric, Bonni, and Shawn	3-10	10
Module 1: B2B Solutions Positioning Mindset	<ul style="list-style-type: none"> • M1 Content: 10 min-- Bonni • M1 Activity Case Study: 10 min-- Ted, Mike, Eric 	11-23	20
Module 2: The Meeting: Making Your Recommendation	<ul style="list-style-type: none"> • M2 Content: 5 min-- Bonni • M2 Activity Case Studies: 20 min—Ted, Shawn, Gene & Marla • M2 Activity Role Play: 30 min—Ted, Marla & Bonni 	24-40	55
Module 3: Putting It All Together	Ted	41-45	5

FACILITATOR NOTES

SUMMARY OF KEY LEARNING

Today we discussed:

- Best practices for establishing a holistic B2B solutioning mindset
- Steps for identifying appropriate solutions based on customer needs and aspirations
- Strategies and success behaviors for positioning solutions with key stakeholders.



FACILITATOR: Ted

REVIEW Summary of Key Learning.

UPCOMING LEARNING OPPORTUNITIES

LEVEL II: CONTINUED



SHOW ME HOW SERIES

REINFORCEMENT TRAINING:

1. **ON AIR CALLS:** Introducing B2B Solutions Positioning: Product Refresh Videos
2. **VIDEOS:**



B2B Solutions
Positioning: **Product
Refresh Videos**

COMING SOON: LEVEL III

PRACTICE & ASSESS SERIES

PRACTICE:

Provide learners with self-directed on-the-job activities and role-plays to practice and reinforce learning.

COACH:

Leaders to provide coaching before, during and after a customer interaction.

ASSESS:

Leaders to assess learner proficiency against B2B Mastery core competencies and make recommendation for certification.

43

FACILITATOR: Ted

REVIEW upcoming Learning Opportunities.

YOUR ACTION PLAN

INSTRUCTIONS:

In Chat answer what you can apply on the job tomorrow to help drive your sales targets.



FACILITATOR: Ted

DO: Select participants to describe their key learning's from this virtual session.

DO: Allow participants to write down their reflections and select a few participants to share their thoughts.

QUESTION & ANSWER



45

FACILITATOR: Ted

SAY: Thank you all for sharing your best practices and making our session engaging and interactive.

FACILITATOR NOTES

POLLING QUESTION

Development Notes:

Set up the Polling Question pod in Abode Connect: *“As a result of this training, I am able to take a structured approach to synthesizing customer needs an identify appropriate solutions?”*

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Allow results to show.



Facilitator: Ted Connolly

Timing: 1 min

What's the focus of this slide: Level 1 Evaluation on Learning Objective

POLLING QUESTION - NPS

Development Notes:

Set up the Polling Question pod in Abode Connect: “On a scale of 1 – 10 (1 being “not likely at all” and 10 being “very likely”), how likely would you be to recommend this training to a colleague?”



Allow results to show.



Facilitator: Ted

Timing: 1 min

What's the focus of this slide: NPS Score

THANK YOU

7-Aug-17