



Business to Business Mastery Program

B2B INDUSTRY INSIGHTS

Uncovering Insight, Delivering Value

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.



SESSION OVERVIEW: This Adobe Connect virtual training session provides learners with the knowledge, skills, and techniques to identify emerging opportunities in the global B2B landscape, craft and deliver meaningful insights that appeal to key stakeholder needs and aspirations.

TOTAL PROGRAM TIMING: 90 minutes

Topic	Champions/Speakers	Pages	Minutes
Opening & Introductions	Ted, Kristi, Luther, Marla, David, Amanda, Christine	3-10	10
M1: What is the Future of B2B Commerce	George H.	11-27	25
M2: Harnessing B2B Industry Insights	Ted (pgs 28-31), Christine (pgs 32-34), Amanda (pgs 35-37) Group Activity: Peter, Rocio, Ted	28-46	50
M3: Putting it All Together	Ted	47-51	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.



HANDOUTS:

1. Researching for Insight: Available Resources
2. Commercial Insight Examples
3. Stakeholder Analysis
4. B2B Discovery Tool
5. Customer Success Profiles

NAVIGATING OUR VIRTUAL CLASSROOM

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

- 1**: Points to the presentation content area.
- 2**: Points to the expand button in the top right of the presentation window.
- 3**: Points to the download button in the bottom right of the presentation window.
- 4**: Points to the chat window at the bottom of the interface.
- 5**: Points to the notes panel on the right side of the interface.

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

REVIEW Adobe Connect functionality and tools available to Learners.

HIGHLIGHT that there will be an exercise with virtual breakout rooms. Highlight any key functionality associated with this exercise.

B2B MASTERY PROGRAM Your Learning Journey

LEVEL I

B2B FOUNDATIONS

B2B TEST-OUT ASSESSMENT

(Tenured Learners Only)

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
- JULY: B2B Solutions Positioning
- AUGUST: B2B Value Proposition

ON AIR REINFORCEMENT

Leverage ON AIR calls to reinforce monthly topic

KEY TAKE-AWAYS PODCASTS

Learners will listen to a podcast on the topic covered for that given month.

ON THE JOB PRACTICE

Provide Learners with a checklist of "on-the-job" activities to reinforce monthly topic.

SHOW ME TRAINING ASSESSMENT

LEVEL III

PRACTICE & ASSESS

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

Provide Learners with a checklist of "on-the-job" activities to reinforce monthly topic.

FINAL REVIEW & ASSESSMENT

1. **Test for Behavior:** based on pre-determined performance metrics, Managers will assess Learners' B2B proficiency to qualify for certification.
2. **Test for Knowledge:** Learners will take an assessment to check for understanding.

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REVIEW: 3 Levels of B2B Mastery Program.

DO: Link back to *LEVEL I: B2B Foundations*. Find opportunities to link this learning to today's sessions.

Examples of this linkage include:

- **B2B Account Overview- Parts A & B** – during these sessions we discussed B2B products overview, available resources to contact, sales process leveraging SFDC, Spend IQ, Implementation process, and Supplier Enablement Criteria.
- **Assessing Our Customer's B2B Needs** – during this session we discussed about the B2B opportunity and trends, B2B P2P Process, various key stakeholders challenges and goals, Needs based sales approach, research strategies, and needs assessment.
- **Positioning Our B2B Solutions:** during this session we discussed customer types and how to assess a B2B opportunity, examples of probing questions, handling objections, and linking the right B2B solutions.
- **B2B Treasury Series:** during this session we discussed the needs of Treasury, bank's strategies for soliciting Finance and Treasury, strategies for reinforcing our value.

WELCOME MESSAGE



Lisa Matysiewicz

VP-Sales & Account
Development
GCPI- GCP GCG



Luther Ranier

LM, VP Sales and Account
Development



Kristi Lane

US Verticals, VP Sales &
Account Management



DO: Leader Welcome Message

TRANSITION: link purpose to training to segment strategic goals.

ALIGNING OUR LEARNING TO OUR GOALS



LARGE MARKET

INNOVATE WITHIN B2B

- Deepen relationships internally across GCP & GMS to unlock B2B spend
- Embed APIs in B2B ecosystems to capture new forms of spend/lend
- Further B2B payments expertise through training and tools (e.g. B2B Mastery, client facing collateral)



GCG

ACCELERATE B2B GROWTH

- Dedicated B2B Integration Team
- Deploy B2B products in lead markets
- Develop B2B AD competency and optimal B2B AD model



GBD

B2B SALES ACCELERATION

- International Growth
- B2B Sales Acceleration

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Review slide.

FACILITATOR NOTES

INTRODUCTIONS

Your Program Speakers



George Hansen

VP, Business of Global
Commercial Alliances, B2B
Digital & Commercial
Platforms



Christine Arnold

Sr. Consultant,
Global Product
Management



Amanda Cobos

Sr. Manager,
Global Marketing



Sandra Ingham

Dir., International
Account Development,
GCPI-GCP GCG



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INTRODUCTIONS: Each CHAMPIONS introduces themselves.

Course Presenters: George Hansen, Christine Arnold, Amanda Cabos

LEARNING OBJECTIVES

B2B INDUSTRY INSIGHTS

During this session, participants will be able to...

- Describe the future of global B2B commerce
- Identify emerging opportunities for B2B Supplier Payments and how AMEX intends to solve for them
- Define commercial insight and strategies for uncovering it
- Formulate and deliver impactful B2B insights
- Tailor approach and messaging with key stakeholders

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READ the slide

REVIEW course learning objectives.

TRANSITION: Learning Roadmap (Agenda)

B2B INDUSTRY INSIGHTS

YOUR LEARNING ROADMAP

MODULE 1



The Future of Global B2B Commerce

- The Future of Global B2B Commerce
- The B2B Gap to Solve
- AMEX is Connecting the Dots

MODULE 2



Harnessing B2B Industry Insights

- What is Commercial Insight?
- Introduce P2P Program Optimization
- Delivering Insights to Key Stakeholders
- SHOW ME: Champion Success Stories Using B2B Industry Insights

MODULE 3



Putting it All Together

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

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REVIEW Learning Roadmap (Agenda).



The Future of Global B2B Commerce

- Review **impact** of technology and consumer connectivity
- Describe emerging **opportunities for B2B** Supplier Payments
- Identify these opportunities and how **AMEX can solve** for them
- Describe **key AMEX initiatives** addressing the future of B2B Commercial Payments

Facilitators: George Hansen

Module Time: 25 MINUTES

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FACILITATOR NOTES

TIME FOR A POLL



DEVELOPMENT NOTE: Set up the Poll Question pod in Adobe Connect



ACTIVITY: Poll Question

POLL QUESTION: “Of the industries listed, which is currently experiencing the most “*disruption*?”

POLL ANSWERS:

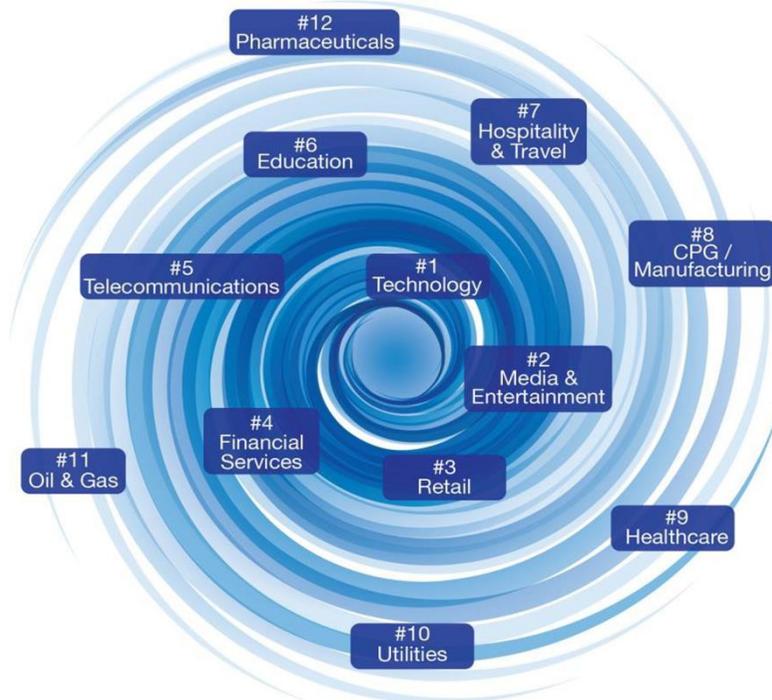
- a) Manufacturing
- b) Telecom
- c) **Technology** (*answer*)
- d) Hospitality & Travel
- e) Education

SAY: On your screen you’ll see a question. Select one of the options by clicking its radio button. As people weigh you can see the results on the screen.

DO: Stop accepting responses when the majority of participants have responded and you’re ready to start. Comment on the results.

DEBRIEF: the industry impacted most is Technology, then Media & Entertainment, Retail then Financial Services.

EVERY INDUSTRY IS BEING DISRUPTED



Source: EY, IMD Switzerland

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NOTE:

- Connected users grew 10X from 1999 to 2013.
- 40% of global population connected today compared to 1% in 1995
- Internet traffic in 2014 was over ~30X what it was in 2004 with the cost of access dropping from \$1245 in 1999 to \$23 in 2012.

SAY: There is an explosion of intelligence that is driving disruption across almost all industries. Data derives from a surge in consumer connectivity, advancements in computing and readable availability of information on and advancement of those devices as well as artificial intelligence.

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To emphasize disruption, Comparing the Fortune 500 companies in 1955 to the Fortune 500 in 2014, there are only 61 companies that appear in both lists. In other words, only 12.2% of the Fortune 500 companies in 1955 were still on the list 59 years later in 2014, and almost 88% of the companies from 1955 have either gone bankrupt, merged, or still exist but have fallen from the top Fortune 500 companies (ranked by total revenues). Most of the companies on the list in 1955 are unrecognizable, forgotten companies today (e.g. Armstrong Rubber, Cone Mills, Hines Lumber, Pacific Vegetable Oil, and Riegel Textile).

the life expectancy of a firm in the Fortune 500 was around 75 years. Today, it's less than 15 years and declining all the time.

FACILITATOR NOTES

DISRUPTION CAN BE OPPORTUNITY

1ST INDUSTRIAL REVOLUTION



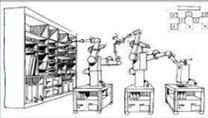
Mechanization,
Steam Power,
Water Power

2ND INDUSTRIAL REVOLUTION



Mass Production,
Assembly Line,
Electricity

3RD INDUSTRIAL REVOLUTION



Computer &
Automation

4TH INDUSTRIAL REVOLUTION



Cyber Physical
Systems

WHAT NEXT?



Source: Forbes, Allaboutlean 15



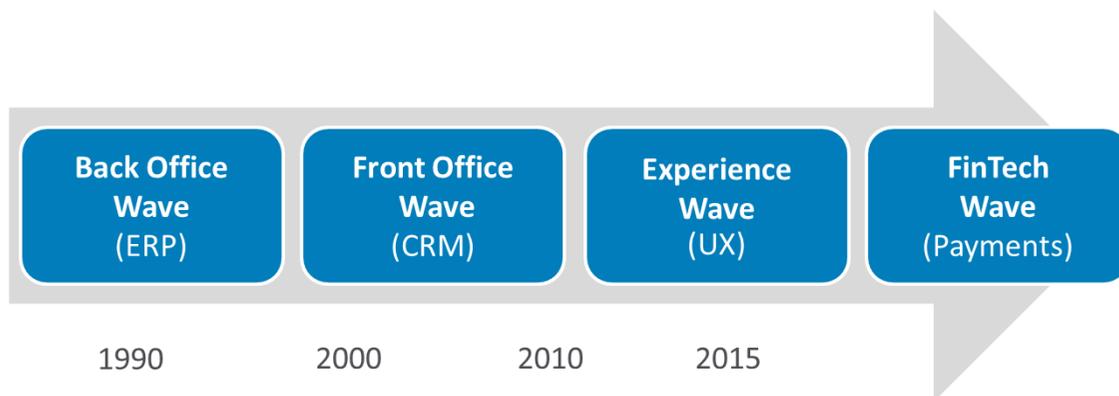
DEVELOPMENT NOTE: This is an *animated* slide so click to reveal each description.

EXPLAIN: History is a record of innovation.

- Thousands of years lead up to the first industrial revolution.
- The 2nd industrial revolution was epitomized by Henry Ford and the assemble line – HUGE. We move into the 3rd revolution – computer and automation revolution
- This brings us into today – And the revolution we are undergoing – and do we even know what it is ?

FACILITATOR NOTES

FINTECH IS THE NEXT TECHNOLOGY WAVE



SAY: Within the last 25 years, enterprise computing has gone through a series of it's own innovations wave.

- It started with a **Back Office Wave** – the installation and automation of large scale platform to manage critical business functions – like ERP
- Next came the **Front Office Wave** and the adoption of enterprise CRM systems to enhance the customer experience.
- Enterprises then moved to the **Experience Wave** – and the digitalization and emphasis of quality user experiences
- We are now embarking on the **FinTech Wave** – the modernization and automation of payments and lending and financial services data

B2B WORKFLOWS & PROCESSES



PURCHASE PROCESS



INVOICING PROCESS



PAYMENT PROCESS



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REVIEW the B2B purchase process has 3 main areas – also sometimes referred to end to end as the Procure to Pay process:

- **Purchase Process** – the platforms and processes that are used to buy something(ERP/Accounting platforms, B2B procurement platforms, & marketplaces)
- **Invoice Process** – often referred to as Account Payable – or AP automation is just that, the workflow and process to receive an invoice
- **Payments Process** – the process and platforms to actually make a payment, of course this is where American Express services customers

SAY: We are looking at ways in which we can integrate the payment process more deeply into the procure to pay process in general, and specifically in the areas of: (ERP/Accounting platforms, B2B procurement platforms, and AP automation solutions).



DEVELOPMENT NOTE: This is an *animated* slide so click to reveal each workflow and process.

SAY: One of the challenges clients face is that The current B2B landscape is highly fragmented There are multiple platforms and point solutions throughout Procure to Pay process creating a web of complexity and integration challenges, often with multiple sources of truth.

FACILITATOR NOTES

GROUP DISCUSSION: CHALLENGES OF AUTOMATING B2B PAYMENTS



GROUP DISCUSSION

TOPIC: Challenges of Automating B2B Payments

Typical Challenges:

- *We have always done it this way – no compelling need*
- *Don't know where to start*
- *No automation in place*
- *Receipt and timing of invoices*
- *Not connected to current systems*
- *Cannot get a view of cashflow*
- *Can't see float with credit card*

DO: Ask open questions of the learners. Leverage whiteboard and or Chat functionality to solicit learner feedback.

In Adobe Connect-

- Activate Whiteboard
- Allow participants to type in answers

ALTERNATIVE: leverage CHAT POD for participants to enter comments.

WHAT'S THE IMPACT TO OUR CUSTOMERS?

VISIBILITY

CFO's report poor
VISIBILITY into
payments

COSTS

60%+
payments are
handled manually
due to mismatches

DELAYS

30%
B2B invoices are paid
AFTER the due period

CONTROL

78%
companies cannot
forecast CASHFLOW
accurately

Source: Hackett Group 2015

REVIEW impacts/challenges to Customers.

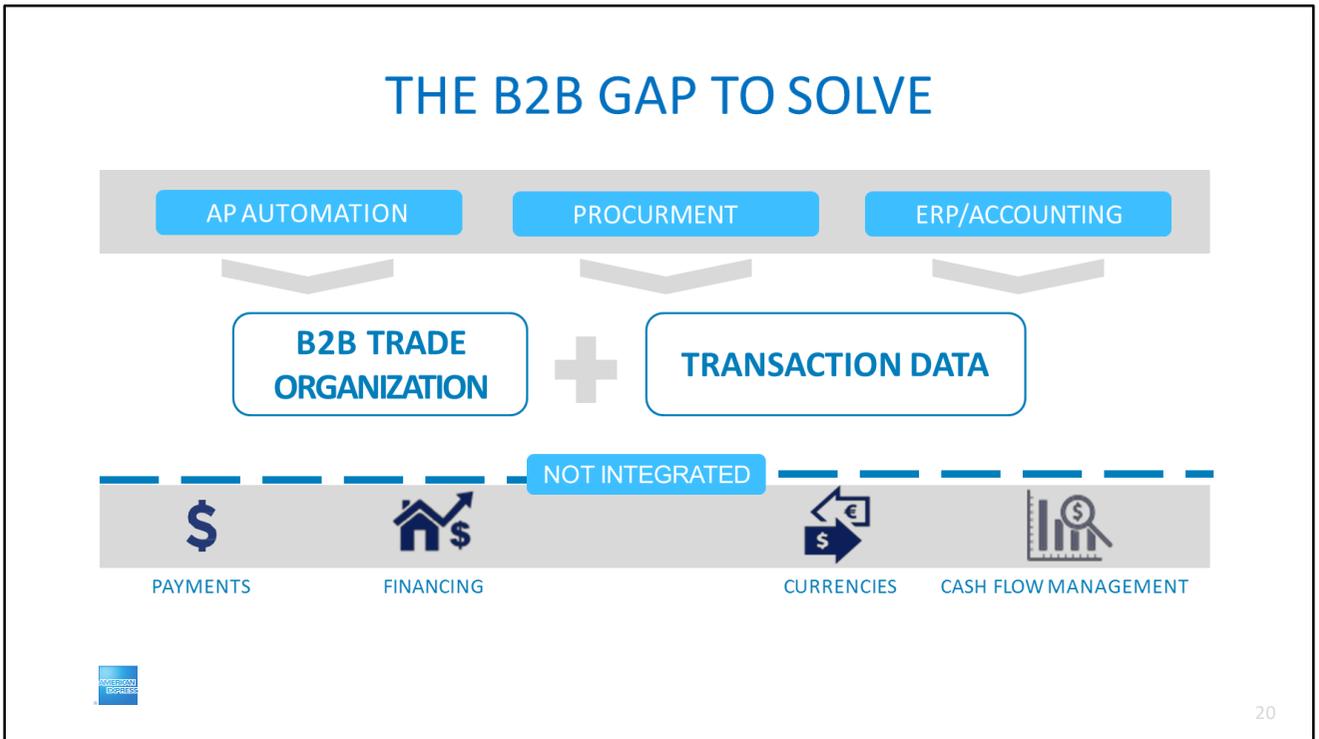
SAY: You may THINK you have the ultimate control with your current process, but you really don't...

Ever have someone cash a check months after you wrote it? Then you know how painful it can be to manage cash for a complex business that relies on traditional payment methods.

Source:

<http://ardentpartners.com/Reports/ArdentPartners-TheStateofB2BPayments2015.pdf>

Andrew Bartolini, Ardent Partners "The State of B2B Payments 2015: Emerging Business Value" 2015 Page 5-- "While paper checks have a variable "float" from the time it takes for a supplier to receive and deposit a mailed check, ePayments allow for precise scheduling of the payment. This creates financial agility that is difficult to achieve with manual payment methods. When payments can be scheduled so accurately, enterprises can make more subtle choices in deciding which suppliers should be paid when."



EXPLAIN: Working with AP Automation, Procurement and ERP/Accounting companies to address B2B trade organizations and transaction data only solves part of the problem. We still need to address what is not solved for- payments, financing, global currencies and cash flow management.

FACILITATOR NOTES

HOW ARE WE SOLVING FOR THE GAPS?

American Express B2B solutions bring customized simplicity and efficiency to corporate P2P payments.



REVIEW slide.

FACILITATOR NOTES

FINANCIAL SUPPLY CHAIN IS OUR DNA



GLOBAL PAYMENTS



FINANCING



DATA

SAY: American Express is keenly interested in leading, and not following this revolution. That's why we're building on our platform of B2B payment systems.

Here's a quick overview of our market-leading offerings components, again not one size fits all.

Corporate Purchasing Card:

- REMOVE Invoices from your process
- Manage low dollar, high volume purchases to help:
 - Control departmental spend
 - Reduce processing costs
 - Increase internal policy compliance

vPayment:

- Control spend and help reduce fraud risk with single-use account numbers to help:
 - Enhance pre-authorization controls
 - *Streamline the procure-to-pay process, including reconciliation using Buyer-defined reference fields that automate reconciliation*
 - Reduce costs related to payment processing

BIP- working capital play :

- Utilize our digital platform to efficiently pay suppliers and take advantage of our payment terms to help:
 - Control payment timing
 - Improve cash management
 - Streamline your supplier enrollment process

INTERNATIONAL B2B PRODUCT PLAN

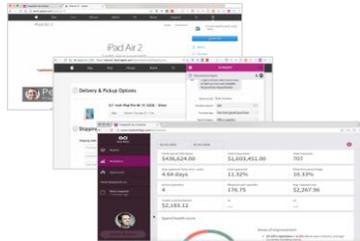
The **International B2B Product Roadmap** also supports growth levers across all regions.

		JAPA			EMEA			AMERICAS			
		AUS	JPN	IND	UK	GER	FR	IT	MEX	CAN	US
B2B	CPC	EN	EN	EN	EN	EN	EN		EN	EN	EN
	BIP	EN		EN	EN	EN	EN	EN	EN	EN	EN
Intl Trade	vPay Next Gen	EX			N	N	N		N	N	EX
	FXIP / Accessline	EX			EX	N					EX
	CGS	EX	EX	EX	EX	N	EX		EX	EX	EX
Core	BTA	EX	EX	EX	EX	E	EX	EX	EX	EX	EX
	Premium	EX	EX	EX	EX	EX	EX	EX	EX	EX	EX
	Globestar	EX	N	EX	EX	EX	EX	N	EX		

N: 2017 New | EX: Existing | EN: Enhancement

REVIEW slide.

FINTCH: POWERING B2B PLATFORMS



ARIBA

Benefits & Capabilities:

- Simple user experience
- Configuration and workflow
- Secure payment and controls
- Visibility into transaction details
- Filtered suppliers and content
- Thousands of categories
- Find and buy non-sourced goods
- Automatic reconciliation in general ledger

Enables procurement of:

- Office Furniture & Supplies
- Electrical and Test Equipment
- Technology and Accessories
- MRO and Industrial Supplies
- Facilities and Maintenance
- Other Urgent and Unanticipated Items

FACILITATOR NOTES

THE B2B GAP : AMEX IS CONNECTING THE DOTS



At the intersection of B2B trade, transaction data, and banking/payments inside the workflows that customers already use.

- 2017 ✓ DIGITAL PLATFORM ✓ GLOBAL PARTNERS ENGAGED ✓ MULTIPLE B2B PLATFORM DEPLOYMENTS ✓ TRANSACTION VOLUMESCALING



REVIEW slide.



B2B MASTERY PROGRAM UPCOMING B2B LEARNING OPPORTUNITIES



THE EVOLUTION OF B2B PAYMENTS

Learn the B2B Landscape between buyers and suppliers and how American Express is uniquely qualified to solve for the B2B challenge.

E-LEARNING



B2B PLATFORMS & SOLUTIONS

American Express has the capability to embed our payment services where clients are already doing business today. Learn about our platform and architecture. Learn about our alliances and the solutions.

VIRTUAL TRAINING
& JOB AID



SOLUTION QUALIFYING QUESTIONS CHECKLIST

What are the qualifying questions you can ask your customer to see if American Express solutions will help with customers?

JOB AID

REVIEW slide.



HOW ARE WE CAPITALIZING ON OPPORTUNITY?

- Large companies want help **optimizing their working capital** and/or **improving efficiency** within their full supply chain.
- We are gaining traction, having the **right “solution-oriented” conversations**, getting **signed agreements**, and **commitments of volume**.
- 2017 is the year we must capitalize on these (and other) opportunities while **strengthening our brand** as the only global payments brand that can bring customized simplicity and efficiency to corporate P2P payments .

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REVIEW slide.



Harnessing B2B Industry Insights

- Define **Commercial Insight**
- Formulating and delivering **impactful B2B insights**
- Review strategies for **leveraging industry, external and internal research**
- **Tailoring your approach and messaging** with key Customer stakeholders

FACILITATORS: Ted Connolly, Christine Arnold, Amanda Cabos, Peter Beach, Rocio Scardamaglia

MODULE TIME: 50 MINUTES

- **CONTENT:** 15 min (Ted, Christine, Amanda)
- **GROUP ACTIVITY:** 30 min (Ted, Peter, Rocio)
- **GROUP DEBRIEF:** 5 min (Ted)

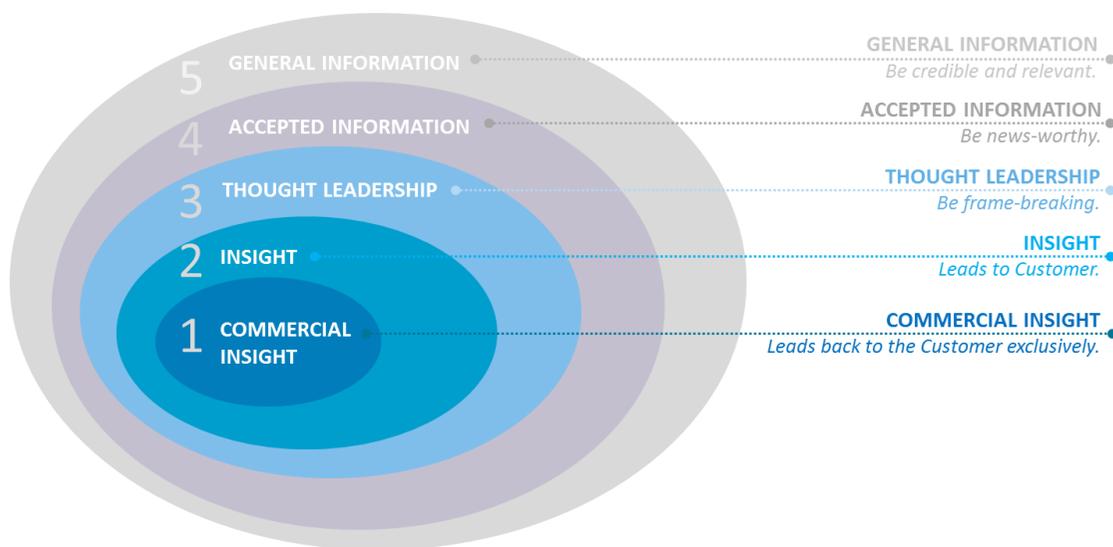
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TRANSITION:

Thank you, George. We just discussed the changes driving the B2B global landscape, the challenges posed to our customers because of these changes, and how AMEX intends to address these challenges to meet Customers’ B2B needs.

Now that we have an idea of how are customers are being impacted, lets now discuss how to best prepare for a Customers’ B2B needs discussion. Preparation starts with researching for insight, turning that insight into questions, then conducting a meaningful customer conversation that is tailored to the given stakeholder. What is Commercial Insight?

WHAT IS COMMERCIAL INSIGHT?



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ASK: “How do you define Commercial Insight?”

DO: “Ask the participants for their understanding and thoughts about Commercial Insight?”

SAY: “We all understand how critical it is to identify Insights as part of the Challenger Model so that we can provide true Commercial Teaching to our customers. However, how to FIND those Insights can be challenging.”

Commercial Insight: Insight: messages or information designed to disrupt/change the customer’s view by getting them to see or think something different about THEIR business. It compares the cost of current behavior against the potential of making a change to allow supplier to sell value not just price.

RAD:

Remember: To be a Commercial Insight, your information has to be totally “RAD” to the customer:

- **R**eframing (frame-breaking, makes the customer think differently)
- **A**ctionable (inspires, compels to action)
- **D**ifferentiated (leads at end to your unique solution)

KEY: Focus on the parts of the customer lifecycles YOU CONTROL: 1) the due diligence research you conduct 2) the degree of Tailoring you do and 3) the Insight Messages you gather and develop based your research.

TRANSITION:

When discussing Commercial Insight, we must link back to the Challenger Model. Specifically, the guiding principles of Commercial Teaching Insight.

INSIGHTS & THE CHALLENGER SALES MODEL



Challenger Sales Model

- **TEACH** for Differentiation
- **TAILOR** for Resonance
- **TAKE CONTROL** of Sale
- **CONSTRUCTIVE TENSION**

COMMERCIAL TEACHING

The seller's ability to deliver a commercial insight in a rational and emotionally compelling way through two-way dialogue.

Commercial Teaching Insight



MAKES CUSTOMER THINK DIFFERENTLY

1 Share Reframe:
Build credibility by reframing the customer's perception of a relevant business issue.



DRIVES TOWARD ACTION

2 Introduce Impact:
Intensify the business consequences and humanize the problem.



LEADS TO YOUR SOLUTION

3 Reveal Value:
Demonstrate the value of taking action (and how you are uniquely positioned to support).

HANDOUT: "Commercial Insight Examples"

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Challenger is a Sales/Expansion Model:

- End Purpose: drive Sales/Expansion success (even during tough times.)
- End Customer: B2B customers including large, complex, consensus based organizations down to smaller, transactional based companies.
- Target Audience to Use & Apply: Sales and AD.
- Methods, Means: Teach, Tailor, Take Control and Constructive Tension behavioral skills mapped to Sales/Expand SFDC Cycles (see below) with tools and resources to use on the job to drive.



HANDOUT: "Challenger Commercial Insight Examples"

TRANSITION:

Gaining true commercial insight, requires research. Let's review the available resources to you for researching for insight and how to convert that research into actual conversation.

RESEARCHING FOR B2B INSIGHT

NEW CUSTOMERS: MARKET & INDUSTRY + EXTERNAL SOURCES

EXISTING CUSTOMERS: + INTERNAL SOURCES = **SO WHAT?**

How do we turn commercial insight research into meaningful customer conversations?

[HANDOUT: "Researching for Insight: Available Resources"](#)



DEVELOPMENT NOTE: This is an *animated* slide so click to reveal each description.

EXPLAIN: When researching for insight, there are various resources that can be leveraged. The key into turn that research into MEANING. You are not just presenting the Customer with research (which they probably already know about themselves/industry), but you are presenting true commercial insight and are positioning that insight into something meaningful and actionable to the Customer.

Transform that insight into questions for the customer to further mine for their needs and to potentially validate your assumptions.

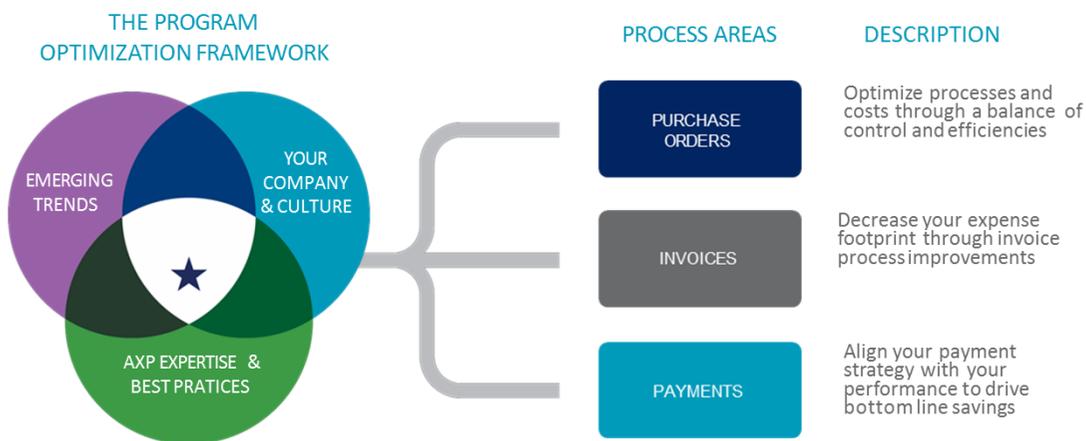
DISCUSS what resources to develop customer insight:

- 1. Market Industry:** Trends, Mergers & Acquisitions, Industry Associations & Publications
- 2. External Sources:** Linked In, Company Website, Press Releases, Newspapers, Google Alerts, Annual Report/10K, Look for existing Amex customers- how do they use the card program, Customer Competitors (peers)
- 3. Internal Resources:**
 - Salesforce (SFDC)
 - Review Customer Contract (client incentives, sign on bonus, claw-backs)
 - Review Financial Metrics (YTD CV, prior year CV, CIF etc.)
 - Client Hierarchy & Organizational Structure (SFDC)
 - Client’s Governance Model
 - Review Account Transition Checklist
 - Meet with Predecessor & Align
 - Client Portfolio Research
 - GSAT Survey Aggregated Results
 - GSAT Profile Card / Top Executive Page
 - Partner with DAR / VPA for historical client information, reporting etc.
 - Review latest BUR presented to segment VP
 - Understand Global / Regional account mgt team structure for client issues
 - P2P Optimization Program
 - Watson
 - Hoover’s
 - Guru Focus (that provides WACC for public companies)

TRANSITION:

One effective internal resource available to you is the P2P Optimization Program. This program and available tools looks a company’s end to end P2P process and identified potential breaks and opportunities. We have Christine Arnold here today to introduce you to this tool and how it yields insight.

P2P PROGRAM OPTIMIZATION & INSIGHT



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FACILITATOR: Christine Arnold

SAY: So we have talked about what’s is going on within the industry, best practices in uncovering insights and some of the different tools to do so, now I wanted to take a few minutes to highlight a tool that you can use now. The **Procure-to-Pay Program Optimization** is an assessment of your customers internal costs related to Purchase Orders, Invoices and Payments. We partnered with The Hackett Group to gain benchmarks that will rank your customer’s current costs to their peers.

SAY: Why is Benchmarking important? I had a discussion with a customer recently who stated “I don’t think we would benefit from benchmarking against best in class, because we are really at an infancy stage. So we know what we are not best in class.”

My response was that we have found benchmarking to be an extremely powerful tool – not only to compare your performance, but to identify best practices and set improvement targets. You may not get to best-in-class immediately, but we can sure help you close the gap and realize cost savings very quickly.

In many ways, benchmarking establishes the best starting point for change - to create an urgency for change.

EXPLAIN: There is a *P2P Program Optimization* form that is used to evaluate a companies end to end P2P process. This data is gathered and analyzed to identity gaps in process, efficiencies and opportunities. These findings can be presented to the customer as how AMEX can uniquely and definitely add value to how they do business.

FACILITATOR NOTES

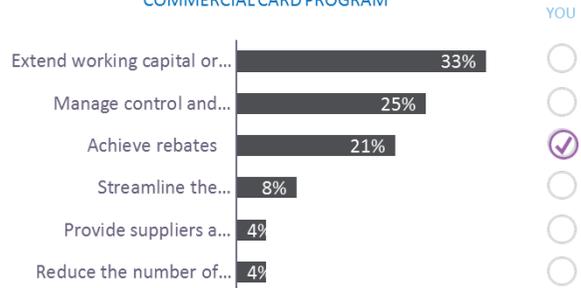
CORPORATE STRATEGY

Increasingly more enterprises today are targeting their P2P processes to drive both efficiency and financial savings, leveraging insights and a diverse solution set. In doing so, Accounts Payable departments are receiving the support they need to drive value and contribute to the organization's competitive advantage.

TOP ORGANIZATIONAL PRIORITIES



PRIMARY OBJECTIVES FOR YOUR B2B COMMERCIAL CARD PROGRAM



FACILITATOR: Christine Arnold

EXPLAIN: this slide demonstrates the focus that our customers have on their organization and the opportunity to educate them on how to better leverage their Commercial Card program to meet these goals.

Accounts Payable leaders are focused on transforming their organizations from a “payment shop” into a more strategic partner to Treasury, Finance, and Procurement. To succeed, they are finding ways to both drive financial results and lower their expense footprint by eliminating paper transactions. Our research, as well as the results from our customers that have already participated in P2P Program Optimization, shows that the top priority for an Accounts Payable department is to streamline their current processes and reduce their internal costs.

However, as you can see on the slide, only 8% of our customers are leveraging their Commercial Card program as a tool to help them generate process efficiencies.

There is a tremendous opportunity for us to close this gap and to capture their attention, we need to understand their priorities and help solve for them. They understand the value of our solutions as contributing to working capital – let’s create that compelling value proposition by combining the two.

P2P PROGRAM OPTIMIZATION SUMMARY

PROCESS AREAS	AVERAGE COST	POTENTIAL SAVINGS	IMPLICATIONS
PURCHASE ORDERS		\$300,000	Define the buying process by balancing the need for improved visibility and compliance while driving productivity for the end user.
INVOICES		\$770,000	Target supplier consolidation and multiple payment solutions to drive electronic invoices which will reduce corrections and cycle times, to realize financial value
PAYMENTS		\$550,000	Focus on increasing electronic payments to improve on-time payments enhancing your ability to generate financial savings through early-pay discounts and incentives

FACILITATOR: Christine Arnold

EXPLAIN: this slide ties it together – we are still talking about rebates, but we are also demonstrate how our products can be leveraged across the P2P process for efficiency savings and calculates the potential cost savings. We are speaking to what is most important to the customer.

So on the next slide is an example of how this tool changes the conversation. We will continue to quantify the financial value and now we can quantify their transaction savings too – we are linking our payment solutions to drive transaction savings – savings that can far exceed the financial rebate.

This is powerful information - it’s insights that we did not have previously – you are teaching – you are also challenging. P2P Program Optimization is a tool that will.

You will continue to hear more about P2P Program Optimization during future On-Air Calls and many of you have already reached out to our team and are actively having discussions with your customers. The feedback has been tremendously positive. Keep the momentum going!

TRANSITION: Now let’s discuss a great new tool to provide insights into the unique motivators and needs of our customer stakeholders.

FACILITATOR NOTES

TAILOR YOUR APPROACH: KNOW YOUR STAKEHOLDERS

TREASURY

THE SEASONED
INVESTIGATOR
ALWAYS LOOKING
OUT FOR THEIR
BUSINESS'S BEST
INTEREST



FINANCE

THE FOCUSED
STRATEGIST WHO
NEVER CRACKS
UNDER PRESSURE



PROCUREMENT

THE TEAM PLAYER
WHO WANTS TO
SUPPORT AND
EMPOWER EVERYONE
ELSE



ACCOUNTS PAYABLE

THE AMBITIOUS
ORGANIZER STRIVING
TO MAKE AN IMPACT



 HANDOUT: "Stakeholder Analysis"

35

FACILITATOR: Amanda Cobos

REVIEW Four Main STAKEHOLDER GROUPS involved in decision-making.

SAY: As part of your previous trainings, you've learn about the stakeholders involved in payment solutions and what they do. But in order to really get to know them, we wanted to learn more about their motivations, lives, frustrations and goals. So we kicked off a research project where we conducted hour long interviews with 40 stakeholders. Today we're going to share just a brief overview of what we learned and then we'll be at an OnAir call soon to go into much more depth.

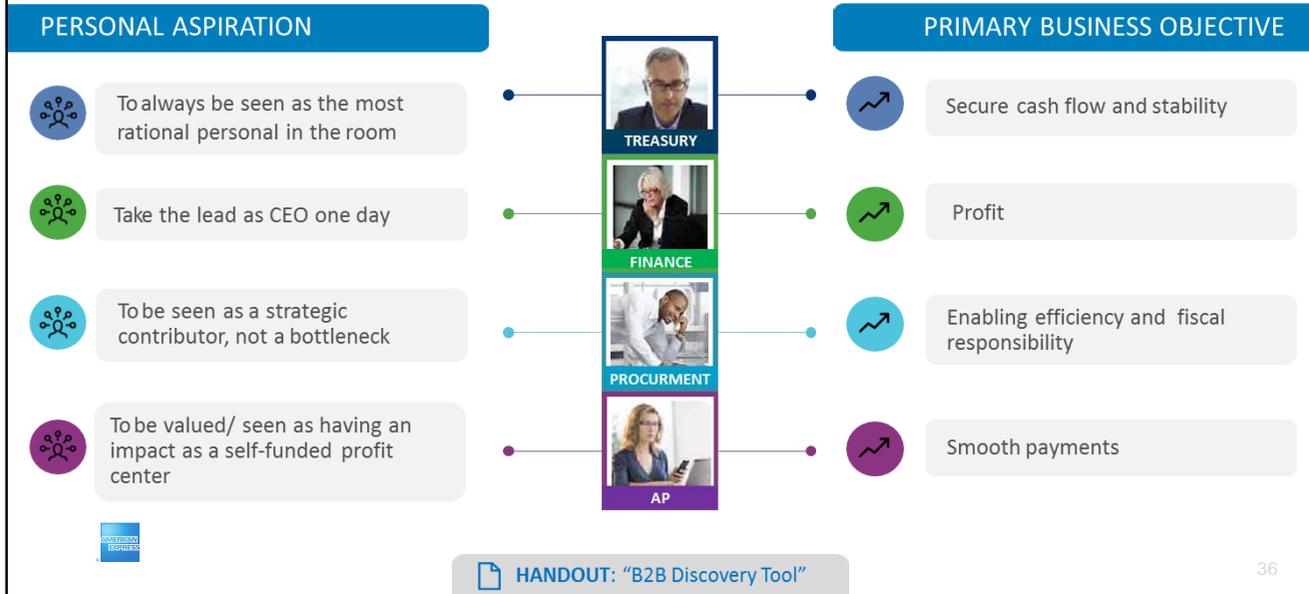
So let's take a quick look at each of the stakeholders and talk about what makes each of them unique

- First, treasurers who we found to be the seasoned investigators always looking out for their business's best interest
- CFOs who are the focused strategists who never crack under pressure
- CPOs who are the team players who want to support and empower everyone else
- And heads of AP who are the ambition organizers striving to make an impact



HANDOUT IN ADOBE CONNECT: "Stakeholder Analysis"

TAILOR YOUR APPROACH: KNOW YOUR STAKEHOLDERS



FACILITATOR: Amanda Cobos

SAY: I want to share a summary we put together about each stakeholder:

- **TREASURERS** are the most rational and level-headed thinker in the room (at least by their standards). These execs bring diverse industry experiences to the table, are always candid, and expect others to be just as honest as they are. They have watched their function evolve greatly over the years, allowing them to focus on more strategic endeavors. They know that every part of their organization depends on them – nothing happens if the money doesn’t move. That’s why they strive to strike the perfect balance between maintaining the right level of liquidity to ensure all company needs are met, and investing capital in meaningful ways. And while they really hate being dependent on others for information and resources, they do lean on their lending partners. Keeping them happy is just part of the job, and they expect all of their partners to deeply understand their business.
- **CFO** are focused, self-sufficient, and direct. These guys make the hard decisions, and they know they can’t always make everyone happy. Their role has evolved from focusing on financial reporting and maintaining a retrospective view to acting as a strategic hub of the business with much more oversight over operations. New efficiencies allow them to focus on making a real impact. But they can only use the quick, analytic skills they take pride in if they have actionable, concise information, and if others are doing their jobs. They’re constantly pulled in different directions and still remain calm under pressure. They believe they can do what most can’t to take their business to new heights.
- **PROCUREMENT:** Supportive, forthcoming, and eager to get involved. These team players pride themselves on supporting the various functions in their company and helping other departments reach their fullest potentials and make strategic impacts. These Procurement professionals are true collaborators and aim to please - not just internally but externally as well. They don’t mind going the extra mile to ensure their supplier relationships are in good standing. If they can find tools that can make the jobs of others in their organizations easier, they are determined to use them – and emerging technologies are helping them with this. However, it’s disheartening for them that despite all this, internal business departments don’t always immediately see procurement’s value - often viewing them as just a bottleneck with no strategic reach. So while these quintessential team players may technically have a seat at the table, they would love to be more welcomed and valued by the business partners they spend so much time supporting.
- **AP:** Efficient and detail-oriented, these ambitious organizers are on a quest to prove their true value. While others in the business may find their day-to-day duties routine and tactical (or even think of outsourcing them), these stakeholders know how critical their function is for the rest of the organization – and their engaged teams help them make even the most mundane of activities enjoyable. Advancements in automation have definitely helped alleviate the headaches that come with the job, but these stakeholders are also acutely aware that these technologies can add to the perception that their presence is less strategic and necessary than it is in reality. They know they’re more than paper-pushers, and it can be discouraging when they have to explain their value to senior leadership over and over again. To end that conversation once and for all, their dream is to turn AP into a self-funded, world-class department that everyone in the organization can be proud of.

 **HANDOUT IN ADOBE CONNECT:** “B2B Discovery Tool (excel)”

FACILITATOR NOTES

STAKEHOLDER ROLES IN DECISION-MAKING

TREASURY

Involves from inquiry to final decision – along with the CFO, Treasurers make the final decision on providers



FINANCE

The Final Decision Maker



PROCUREMENT

Makes strong recommendations to Finance and Treasury based on identified internal stakeholders/ business needs and the relationship with the potential providers



ACCOUNTS PAYABLE

Facilitates much of the implementation and execution post-decision. Their preferences are taken into account because they use the tools, but they usually don't make the final decision



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FACILITATOR: Amanda Cobos

NOTE: Each stakeholder has a distinct and important role in corporate payment decision-making.

SAY: So that was a very high-level summary of what we learned about each stakeholder. What we've been hearing from you is that developing relationships and a web of influence across all of these stakeholders is a key priority for your teams and critical to growing and retaining our clients. While each client will have a different structure, decision making process, and set of key stakeholders, we know that at the majority, treasury and finance have a critical seat at the table and we hope that through this work, you'll feel better armed to continue building meaningful relationships with those functions even if you haven't historically worked with them. In the OnAir call we'll share even more information about who these stakeholders are as people and what they care about so that we can truly become valuable partners for them.

And with that, I'll pass it back to Ted.

KEY TAKEAWAYS...

- Describe changes within the **global B2B environment** and how our **Customers are being impacted**.
- Articulate how **AMEX is prepared to meet our Customer's B2B challenges and needs**.
- Deliver **commercial insight** that leads exclusively back to the Customer's B2B Needs.
- Leverage **Challenger Model** to structure **meaningful and impactful B2B insights**.
- Transform your research for **B2B insight into customer questions** that drive **meaningful conversation**.
- **Tailor your approach and messaging** to better resonate with key Customer stakeholders.

FACILITATORS: Ted Connolly

REVIEW Key Takeaways.

NOTE: This slide serves as a summary of Modules 1 and 2.

TRANSITION: Now let's participate in a Group Activity where we will hear some *Customer Success Stories* of AMEX representatives that successfully demonstrated these key behaviors and win business. Let's start with Peter Beach and his win with NY Life Insurance.



GROUP ACTIVITY:

Champion Success Stories Using B2B Industry Insights



STEP 1: Champions to review “Customer Success Profiles”:

1. *NY Life Insurance*
2. *American Express*

STEP 2: Discuss strategies for uncovering and communicating insight

STEP 3: Group Debrief



TIME: 35 MINUTES

 **HANDOUT:** “Customer Success Profiles”

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CONDUCT GROUP ACTIVITY (TED)



PREPARATION:

- Set up 2 Chat Pods for the below questions. There you be a total of 4 Chat Pods – 2 for each Success Profile.
 1. *How would you research for insight for this given Customer?*
 2. *Given the insights uncovered, what questions would you ask the Customer?*

DESCRIBE steps for Group Activity.

NOTE:

1. Customer Profiles will be available in Adobe Connect that participants can download– or just keep it on screen.
2. Based on Customer Profile and pre-work, participants can either whiteboard or use the chat feature to input their responses.



SUCCESS STORY: NEW YORK LIFE INSURANCE

Industry: Financial Services



Peter Beach
US LARGE MARKET
Account Development

Company Description	Nation's top mutual life insurer with life insurance and annuities being its core businesses. Products include long-term care insurance and special group policies sold through AARP and other affinity groups and professional associations. NY Life Investments' offerings include mutual funds for individuals and investment management services for institutional investors. Through NY Life International, the firm provides life policies in many overseas markets. Founded in 1841, New York Life is owned by its policyholders.
# of Employees	12,150
Date/Period	RFP announced in March 2016, Contract expired in Nov 2016 - 3-month extension signed Dec 2016, Verbal win announced in Jan 2017
Customer Type	Existing client since 2006
Annual Sales Revenue	2016 Sales \$24.78B
Opportunity Size/ Growth Potential	Existing Products: Corporate Card – \$51.1M, Corporate Purchasing Card -\$24.8M New Cross Sell: BIP - \$50M
Key Stakeholder(s)	Chief Procurement Officer, VP Corp Services, VP Procurement & Strategic Sourcing
Customer Goals	<ul style="list-style-type: none"> • Conduct a competitive RFP • Aggressive incentive program • Strong B2B offering • Knowledgeable Account Management Team
Customer Challenges	<ul style="list-style-type: none"> • Strong Treasury relationships, B2B Reconciliation , Expense Management • Client outsourced the RFP to Accenture (third party) to manage the process. • Treasury Dept. was pushing hard for JP Morgan to win the business
Hurdles	<ul style="list-style-type: none"> • Procurement team demanded very aggressive pricing just to be included in the final round of RFP. • Banks submitted powerful pricing offers including large signing bonuses • Turning the client away from a purely financial based RFP battle to an overall program value understanding.

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CONDUCT GROUP ACTIVITY: 15 Minutes

SUCCESS PROFILE CHAMPION: Peter Beach (Large Market)

Leads the discussion. Ask participants below key questions. Give a few minutes for participants to share either (chat feature/whiteboard/by phone). Spend majority of the time sharing how you accomplished the below questions. We encourage you to share any materials you leveraged to uncover your insight on your client.

KEY CHAMPION QUESTIONS:

ASK: How would you research for insight for this given Customer?

DO: Champions share how the researched for insight and what they uncovered.

ASK: Given the insights uncovered, what questions would you ask the Customer?

DO: Champions share how they communicated insight and were successful.

NOTE: Champions are encouraged to share any collateral- examples of communications, industry/market, external and internal research examples (articles in industry publications, LinkedIn, company annual report, client contract review, Salesforce, etc.).



CHAT ACTIVITY:

Champion Success Stories Using B2B Industry Insights

Using the **CHAT FEATURE**, type in the answers for the following questions:

CHAT POD #1

How would you research for insight for this given Customer?

Enter your comment here...

Everyone

CHAT POD #2

Given the insights uncovered, what questions would you ask the Customer?

Enter your comment here...

Everyone

41



CONDUCT GROUP ACTIVITY (TED)



PREPARATION:

- Set up 2 Chat Pods for the below questions. There you be a total of 4 Chat Pods – 2 for each Success Profile.
 1. *How would you research for insight for this given Customer?*
 2. *Given the insights uncovered, what questions would you ask the Customer?*

DESCRIBE steps for Group Activity.

NOTE:

1. Customer Profiles will be available in Adobe Connect that participants can download– or just keep it on screen.
2. Based on Customer Profile and pre-work, participants can either whiteboard or use the chat feature to input their responses.



COMMERCIAL TEACHING INSIGHT: NEW YORK LIFE INSURANCE

1 SHARE REFRAME

Build credibility by reframing the customer's perception of a relevant business issue.



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

2 INTRODUCE IMPACT

Intensify the business consequences and humanize the problem.



- Improve process efficiencies
- Achieve Financial Incentive
- Migrate more payments to electronic form
- Streamline the process and increase float

3 REVEAL VALUE

Demonstrate the value of taking action (and how you are uniquely positioned to support).



- American Express will leverage proven proprietary supplier enablement strategy customized for NY Life
- Projected the 5 year incentive value of over \$7.2M
- Ability to customize the program based on NY Life's additional needs
- Proven Account Management team that understands NY Life a will ensure success



CONDUCT GROUP ACTIVITY

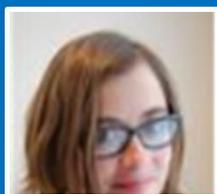
REVIEW Commercial Teaching Insight for *NY Life Insurance*.

- **Reframe:** industry specific insight/expertise, specific to the Merchant's business model
- **Impact:** creates tension, educates
- **Value:** this is where AXP is finally mentioned, asks open ended question at end to keep dialogue going, etc.



SUCCESS STORY: AMERICAN EXPRESS

Industry: Financial Services



Rocio Scardamaglia
Global Client Group
International Account
Manager

Company Description	Global financial services company ranked #85 Fortune 500, \$161B Total Assets, 117,8B CIF, \$1T Worldwide Billed Business, with \$32.8B Annual Revenue. World's largest card issuer by purchase volume, processing millions of transactions daily. In addition to our extensive consumer cardmember base, American Express works closely with thousands of corporate customers (from small business to large global clients) helping them achieve financial control through the use of their outstanding payment tools and world class expertise.
# of Employees	56K
Date/Period	2016
Customer Type	Existing
Annual Sales Revenue	\$32.8B
Opportunity Size/ Growth Potential	\$1.5B
Key Stakeholder(s)	Supply Chain/Procurement, Global AP
Customer Goals	<ul style="list-style-type: none"> Company Level Goal - Reduce \$1B in operating costs by end of 2017 Procurement Goal – deliver \$150M savings
Customer Challenges	Procure to Pay process very time consuming, inefficient and costly <ul style="list-style-type: none"> \$8B spend, 22K suppliers Processing >150k Purchase Orders and approx. 280k Invoices with an avg cost to AMEX of \$16 per transaction
Hurdles	<ul style="list-style-type: none"> Weak relationship with CPO and GSM org Assumptions that B2B program was mature

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CONDUCT GROUP ACTIVITY: 15 Minutes

SUCCESS PROFILE CHAMPION: Rocio Scardamaglia (GCG)

Leads the discussion. Ask participants below key questions. Give a few minutes for participants to share either (chat feature/whiteboard/by phone). Spend majority of the time sharing how you accomplished the below questions. We encourage you to share any materials you leveraged to uncover your insight on your client.

KEY CHAMPION QUESTIONS:

ASK: How would you research for insight for this given Customer?

DO: Champions share how the researched for insight and what they uncovered.

ASK: Given the insights uncovered, what questions would you ask the Customer?

DO: Champions share how they communicated insight and were successful.

NOTE: Champions are encouraged to share any collateral- examples of communications, industry/market, external and internal research examples (articles in industry publications, LinkedIn, company annual report, client contract review, Salesforce, etc.).



CHAT ACTIVITY:

Champion Success Stories Using B2B Industry Insights

Using the **CHAT FEATURE**, type in the answers for the following questions:

CHAT POD #1

How would you research for insight for this given Customer?

Enter your comment here...

Everyone

CHAT POD #2

Given the insights uncovered, what questions would you ask the Customer?

Enter your comment here...

Everyone

44



CONDUCT GROUP ACTIVITY (TED)



PREPARATION:

- Set up 2 Chat Pods for the below questions. There you be a total of 4 Chat Pods – 2 for each Success Profile.
 1. *How would you research for insight for this given Customer?*
 2. *Given the insights uncovered, what questions would you ask the Customer?*

DESCRIBE steps for Group Activity.

NOTE:

1. Customer Profiles will be available in Adobe Connect that participants can download– or just keep it on screen.
2. Based on Customer Profile and pre-work, participants can either whiteboard or use the chat feature to input their responses.



COMMERCIAL TEACHING INSIGHT: AMERICAN EXPRESS

1 SHARE REFRAME

Build credibility by reframing the customer's perception of a relevant business issue.



- Procurement organizations want to transform/be seen as key assets of the Companies, and are looking for ways to generate revenue.
- The traditional process of procuring & paying is time consuming, inefficient & costly, especially for the tail end spend.
- It is a known trend that many Companies are extending payment terms with their suppliers.

2 INTRODUCE IMPACT

Intensify the business consequences and humanize the problem.



- Amex has made a commitment to its shareholders to reduce \$1B in operating costs in 2 years and that Procurement has a specific goal of reducing \$150M.
- Amex is currently processing >150k Purchase Orders and approx. 280k Invoices. 78% of those invoices are <\$10K. Based on the information you provided, processing each invoice costs you \$16. You could be saving \$3.5M annually by focusing on removing those transactions from your process.
- Amex falls within the group of companies that have shorter payment terms in the market. You could benefit from moving your suppliers from 30 to 60 days in line with the market. You could offer accelerated payments through an Amex payment product.

3 REVEAL VALUE

Demonstrate the value of taking action (and how you are uniquely positioned to support).



- Streamlined process leveraging technology (Vpayment and BIP: ERP integrated products)
- Reduction in FTE processing invoices, reallocation to other value adding activities
- Reduction of operating costs (manual work, PO/invoice fees)
- Increased end user satisfaction (elimination of PR submission for transaction <\$10K using Vpayment)
- Gain financial benefits from extended DPO while increasing supplier satisfaction by paying them faster (BIP, CPC, Vpayment)



CONDUCT GROUP ACTIVITY

REVIEW Commercial Teaching Insight for *American Express*.

- **Reframe:** industry specific insight/expertise, specific to the Merchant's business model
- **Impact:** creates tension, educates
- **Value:** this is where AXP is finally mentioned, asks open ended question at end to keep dialogue going, etc.



GROUP DEBRIEF:

Champion Success Stories Using B2B Industry Insights



What **B2B Industry Insight techniques** do you intend to use with a Customer?

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DEBRIEF GROUP ACTIVITY

NOTE:

Once participants have re-joined the main group, 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.



BEST PRACTICE:

- ✓ 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

FACILITATORS: Ted Connolly

MODULE TIME: 5 MINUTES

Topic	Champions/Speakers	Pages	Minutes
Opening & Introductions	Ted, Kristi, Luther, Marla, David, Amanda, Christine	3-10	10
M1: What is the Future of B2B Commerce	George H.	11-27	25
M2: Harnessing B2B Industry Insights	Ted (pgs 28-31), Christine (pgs 32-34), Amanda (pgs 35-37) Group Activity: Peter, Rocio, Ted	28-46	50
M3: Putting it All Together	Ted	47-51	5

SUMMARY OF KEY LEARNING

Today we discussed:

- The future of global B2B commerce
- Emerging opportunities for B2B Supplier Payments and how AMEX intends to solve for them
- Commercial insight and strategies for uncovering it
- Strategies for delivering impactful B2B insights
- Tailoring your approach and messaging with key stakeholders



REVIEW Summary of Key Learning.

UPCOMING LEARNING OPPORTUNITIES



LEVEL II

"SHOW ME HOW" SERIES

SHOW ME HOW VIRTUAL TRAINING SERIES

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

ON AIR REINFORCEMENT

Leverage ON AIR calls to reinforce monthly topic

KEY TAKE-AWAYS PODCASTS

Learners will listen to a podcast on the topic covered for that given month.

ON THE JOB PRACTICE

Provide Learners with a checklist of "on-the-job" activities to reinforce monthly topic.

SHOW ME TRAINING ASSESSMENT



LEVEL II

UPCOMING LEARNING OPPORTUNITIES

GCG, GBD & LM: ON AIR CALLS

- "Clearing the Way: A Guide to Large Customer Stakeholders & How to Serve Them" (Project Looking Glass)
- "P2P Program Optimization" (Altitude P2P)

KEY TAKE-AWAYS PODCASTS

ON THE JOB PRACTICE

You will receive a checklist of "on-the-job" activities to reinforce key learning for LEVEL II.

COMING SOON!

- The Evolution of B2B Payments (e-learning)
- B2B Platforms & Solutions (virtual training & job aid)
- Solution Qualifying Questions Checklist (job aid)

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REVIEW upcoming Learning Opportunities.

1. **THE EVOLUTION OF B2B PAYMENTS** (e-learning): Learn the B2B Landscape between buyers and suppliers and how American Express is uniquely qualified to solve for the B2B challenge.
2. **B2B PLATFORMS & SOLUTIONS** (virtual training & job aid): American Express has the capability to embed our payment services where clients are already doing business today. Learn about our platform and architecture. Learn about our alliances and the solutions.
3. **SOLUTION QUALIFYING QUESTIONS CHECKLIST** (job aid): What are the qualifying questions you can ask your customer to see if American Express solutions will help with customers?

YOUR ACTION PLAN

INSTRUCTIONS:

In Chat answer what you can apply on the job tomorrow to help drive your B2B sales targets.



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



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

THANK YOU

11-May-17