POSSIBLE (RE)DEFINED

Digitally Transform Your Lead-to-Cash Process

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A Fast-Moving Climate Requires A New Way of Thinking

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Possible (Re)Defined℠
Go further, faster

Gain confidence and clarity to tackle challenges
or plan for tomorrow's aspirations

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AREA OF FOCUS

Today, We're Covering

Digital Transformation

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KNOWLEDGE

Learning Objectives

- Understand the lead-to cash process
- Discuss the breakdown of human elements
- Explore the challenges of disparate systems
- Bridge lead-to-cash process gaps with digital transformation

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WELCOME

Today's Presenters

Nick Gibbons

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Partner
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Consulting
Senior Manager
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Consulting
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EXPLORING NEW AREAS

Agenda

- What is Lead to Cash?
- What role does marketing play in the sales function?
- What are the challenges of disparate systems?
- How can you optimize through digital transformation?
- Success Stories
- Q & A

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5 Steps to a Holistic Lead-to-Cash Process

As a business leader, getting a holistic view of each step in your lead-to-cash process begins with lead generation all the way through to final payment. This gives your people the tools they need to streamline operations and focus on core business initiatives.

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Lead to Cash Process

Lead to Qualify	Qualify to Order	Quote to Cash	Cash to Care	Retain to Grow
Generate Leads	Generate quotes quickly and accurately	Take and fulfill orders	Customer Service	Nurture valued clients
Develop relationships to convert prospects to clients	Track sales processes	Process billing	Lower CAC, Raise CLV	Explore opportunities for automation
Qualify opportunities (marketing, sales, finance)	Understand customer purchase cycles and geographies	Track and receive payments	Build out loyalty programs	Identify cross-selling and upselling opportunities

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BARRIERS

What Is Lead to Cash and Why Should You Care?

- May also know it by CPQ, which stands for Configure, Price, Quote. It's a process and a product.
- 100% of all companies have a CPQ process
- Lead to Cash is mission-critical process to SaaS companies. With it they can:
  - Ensure accurate pricing and contract approvals
  - Store, make changes to, and renew contracts
  - Bill clients accurately
  - Comply with tax code and ASC 606

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MARKETING POV

What Is Lead to Cash and Why Should You Care?

- Customer effort is the strongest driver of customer loyalty
- When a customer enters your space – they are 4X more likely to leave disloyal than when they entered
- Often the cause is internal friction and a lack of cohesion in the purchase process
- Disloyal customers impact the company negatively with poor reviews, negative referrals, and limited future purchases
- A smooth, seamless customer journey – from awareness to advocacy – with an aligned back and front office is essential

Source: Gartner “What’s Your Customer Effort Score?”

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Customer Journey

& Front Office Transformation

In today's shifting marketplace, it's more important than ever to have a holistic understanding of your customer to drive loyalty and business growth. Wherever you are in the journey, our experts are here to help.

MARKETING & SALES

Enter new markets, generate leads, increase conversion, measure customer acquisition costs and lifetime value, encourage retention and advocacy

OMNICHANNEL STRATEGY

Deliver engaging experiences and ensure seamless interactions at every touchpoint in the customer journey

OPERATIONAL INNOVATION

Create a culture of innovation by adopting design thinking methodologies to create valuable experiences customers reward with loyalty

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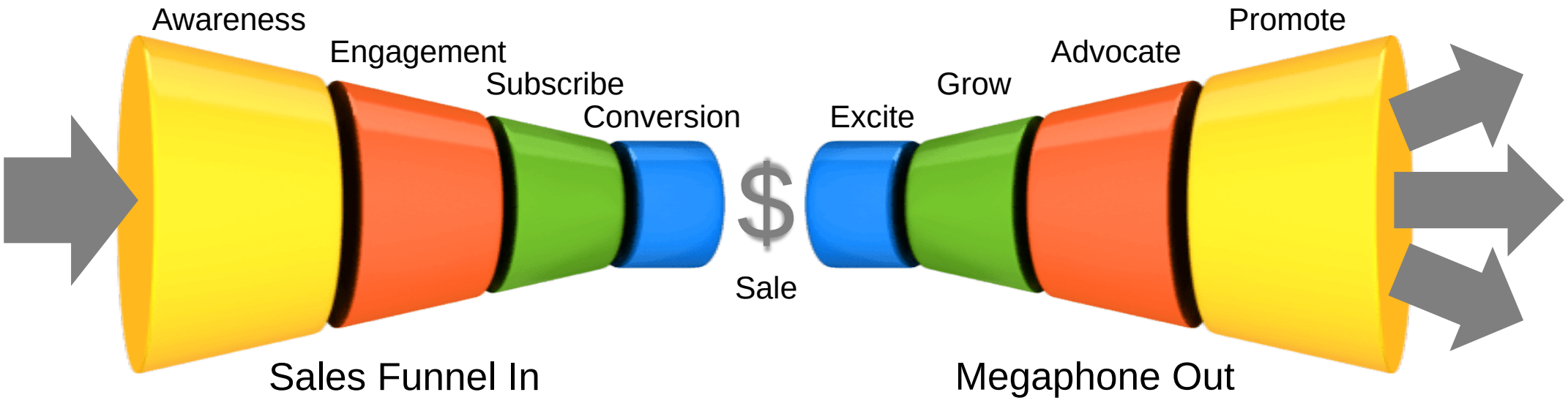
Ideal Customer Profile and Journey Map

**An effective customer journey begins with awareness and ends with advocacy…
and involves an intentional integration of marketing, sales, and customer experience**



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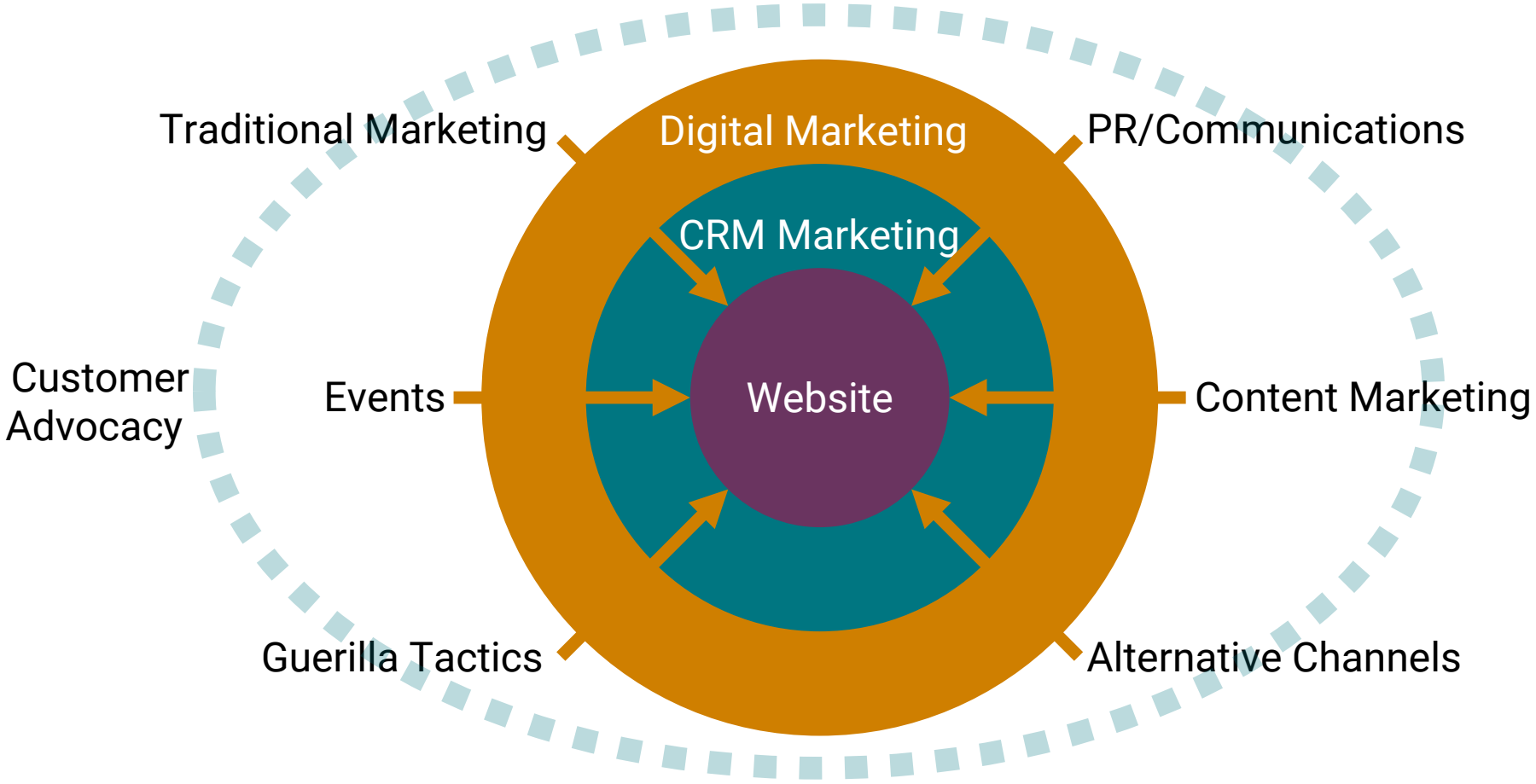
Gain & Retain "Engine" for Growth

Digital transformation in the front office



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CHALLENGES

Common Issues

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DIGITAL TRANSFORMATION

Benefits of Optimizing the Process

- Improve Data Quality – unify CRM and ERP/financial management
- Save time by eliminating manual data
- Minimize human errors
- Focus on strategic work
- Revenue Recognition Compliance

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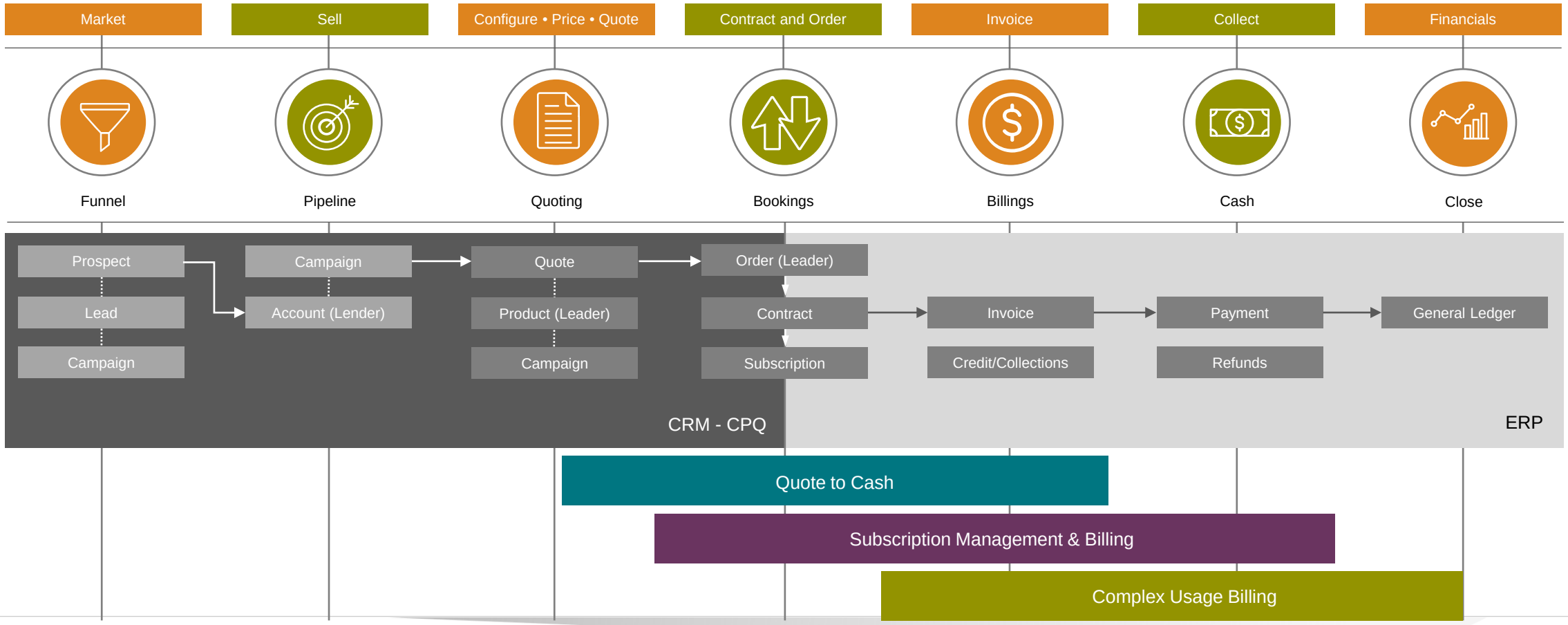
Common Scenario: Overlapping Capabilities, Disparate Systems

Competitors and partners have overlapping capabilities with different strengths and weaknesses



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Connecting CRM & ERP

The Four Major Options to Know

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CLIENT SUCCESS

Successful Implementation

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WHAT NOW?

Getting Started

- Start by thoroughly assessing your current lead-to-cash process
  - Document current processes by interviewing sales representatives, sales operations, order fulfillment and finance team members
  - Determining quick wins and a long-term plan for integrating your ERP and CRM systems
  - Ensuring your new process is compliant with ASC 606 revenue recognition guidelines and documenting it with an accounting memo
- Find the software platform and or integration that is right for you

Need help? Contact experts@armanino.com to help you assess, plan and execute the digital transformation of your lead-to-cash process.

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THAT'S A WRAP

Thank you for attending

Additional Questions?

Reach out to us at

Experts@armanino.com

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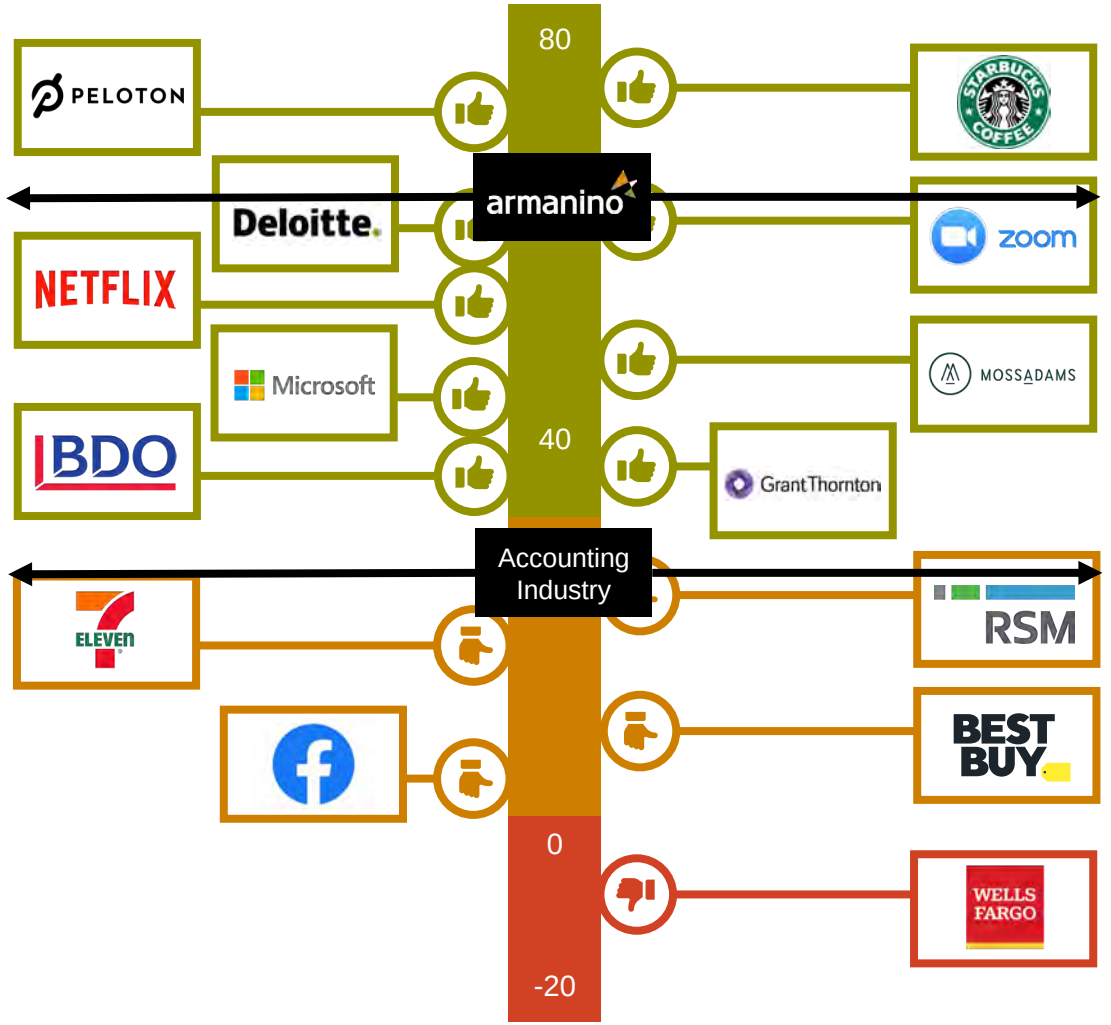
OUR CLIENTS' VIEW

We're Just What You Need

A Net Promoter® Score (NPS) is used by more than two-thirds of Fortune 1000 companies. **Armanino's NPS (68) is almost two times higher** than the accounting industry average (38), and it places the firm scores closest to household name brands such as Starbucks, Peloton and Zoom.

5 YEARS DIAMOND AWARD 2017 - 2021

BEST of Accounting™ CLIENT SATISFACTION



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OUR PROMISE TO YOU

Reimagine Your Potential

Unconventional Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage

Comfort in Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.

Focused on You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.

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A New and Better Way for Today and Tomorrow

Equipping you with the insights and tools needed to redefine what's possible

COMPLIANCE & REGULATORY

- Tax Planning
- Trust & Estate
- SOX
- Contract

ASSURANCE & ADVISORY

- Cybersecurity
- SOC
- Restructuring
- Revenue Recognition

STRATEGY & PLANNING

- Corporate Strategy
- Strategic Advisory
- Benchmarking
- Business Transformation

STAFFING & DEVELOPMENT

- Payroll
- Health Benefits
- Executive Search
- Interim Placement

TECHNOLOGY SYSTEMS

- ERP
- CRM
- Business Intelligence
- Managed Services

ACCOUNTING & BACKOFFICE

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable

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Delivering impactful, bold solutions that increase clarity and spark success for today and tomorrow.

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