

# CFO APPROVAL GUIDE.

A step-by-step playbook for getting budget holders to approve your deal — even during a downturn



# How to use this Guide

1

## Get “inside their head”

Discover how CFOs make decisions so you can get inside their head and unlock what makes them say Yes (slides 3 and 4).

2

## Fill in the template

Partner with your champion(s) to build your business case using details from previous discussions.

3

## Co-present with your champion

Do a practice pitch with your champion before you co-present to the CFO to make sure they're comfortable and confident.

[Link to Google Doc version](#) that you can copy and customize

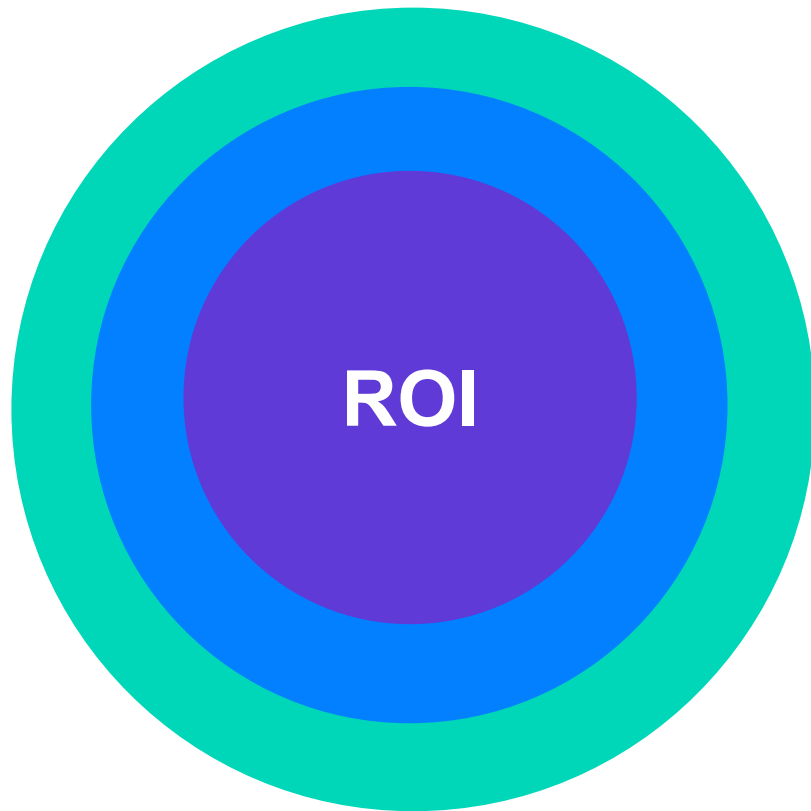
# How CFOs Make Decisions.

CFOs are the adult in the room, asking the questions your champion didn't think to ask. **But they listen if you've identified a real problem in their business.**

This CFO ROI document is not meant to replace a full business plan, think of it as an executive summary for CFO-eyes only.

Remember, this is not about you as the vendor. It should look like it's written by the CFO's FP&A team, objectively analyzing a business problem and recommending a solution.

**And ideally that solution is you.**



# Dos and Don'ts

- ✓ Keep it simple: a real problem, clear value, and transparent costs
- ✓ Show your proposal has wide endorsement across the org
- ✓ Focus on near-term benefits and delivering faster time to value
- ✓ Show you have an adoption strategy to prevent risk of “shelfware”
- ✓ Give your executive sponsor the resources and coaching they need to convey value in their own words
- ✓ Prepare by meeting with your CFO to uncover what's on their mind
- ✗ Don't waste time detailing *how* you deliver value, CFO are mostly interesting in What and Why
- ✗ Don't ask for attention during CFO crunch times like EOQ
- ✗ Don't share a bias ROI calculator with hidden multipliers
- ✗ Don't ignore costs and risks of change management
- ✗ Don't PDF this document. Let your sponsor copy and paste into their own format (link to Google Docs version)
- ✗ Assume they only care about cost-cutting

# Problems to Solve

(Include cost of pain)

1. Here's the first problem described in 15–20 words. It's not detailed, it's almost a slogan at this level.
2. Here's the second problem described in 15–20 words. It's not detailed, it's almost a slogan at this level.
3. Need to include 3rd and 4th problem? Keep them even shorter. If they don't move the needle leave them out.

[Link to more detail like a full business case](#)

*This page not about you as the vendor. This is about the customer's problem as if they wrote it. No numbers? Paste an image or employee quote that illustrates the problem.*

# \$23M

These numbers quantify the problem

# 23%

These numbers quantify the problem

# 23

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*Name Surname,  
Position*

**\$23M**

These numbers  
quantify the problem

**23%**

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**23**

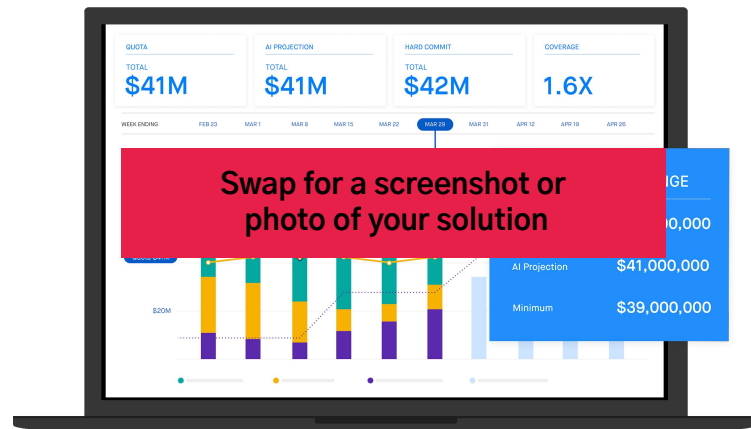
These numbers  
quantify the problem

# Recommended Solution

Here is a 40-word paragraph of how to fix the problem. This is still not mentioning your solution yet, but rather, the high-level overview of how to fix the problem. This description should set up your solution perfectly and subtly invalidate in-house solution or other vendors.

## **Bolded solution / vendor name**

Here are 25 words about your solution. This is your value prop, but remember to prompt your champion to use their own words .



FROM		TO
Here is summary of first bullet from Problem statement slide	→	Here is the future state that you provide for this pain point. Keep it high level. No more than 30 words, otherwise the CFO will stop reading.
Here is summary of second bullet from Problem statement slide	→	Here is the future state that you provide for this pain point. Keep it high level. No more than 30 words, otherwise the CFO will stop reading.
Here is summary of third bullet from Problem statement slide	→	Here is the future state that you provide for this pain point. Keep it high level. No more than 30 words, otherwise the CFO will stop reading.

**This page is about your solution, but if it was written by your champion.** Encourage them to restate key points in their own words. Champ should be able to demo your solution.

# Org Impact Summary

In addition to solving problems X,Y,Z, Solution/Vendor benefits other teams across the org.

- Bullet out any other teams that benefit from your solution
- Include a time frame for when they'll see impact

## SIGN OFFS



Names of the teams or leaders who will benefit. Ideally, you can state that they've all signed off.

## Change management requirements

- Bullet out high level implementation and adoption plans
- Include a time frame
- Include amount of effort
- Include any risks and say you account for them

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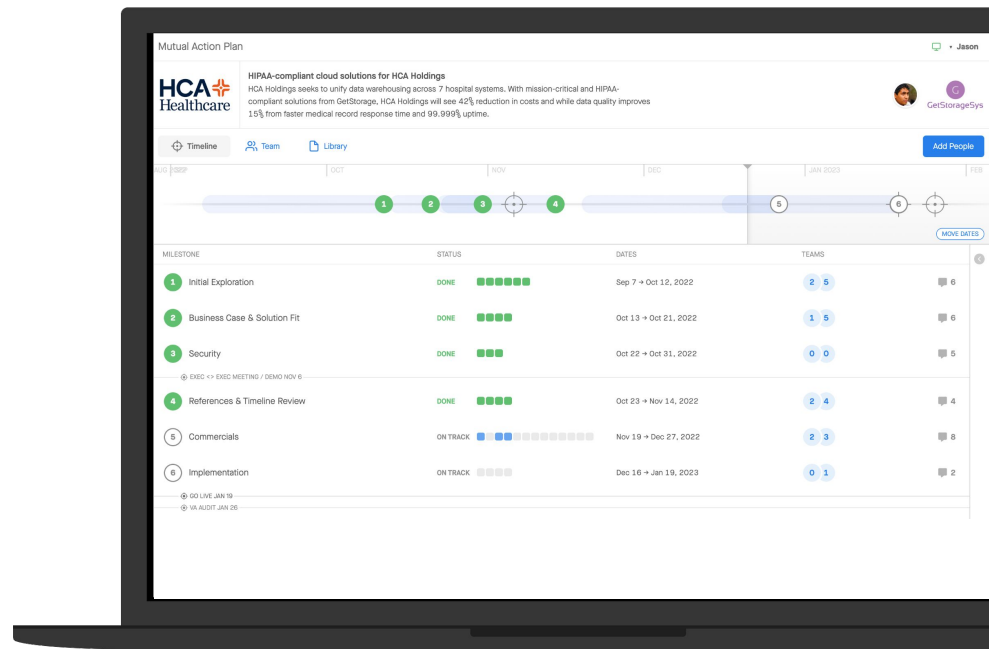
# Timeline

Show you have a plan and a timeline with milestones to accomplish. Convey existing momentum with some milestones already completed.

This can be written out, but ideally it's a screenshot of a more detailed mutual action plan.

## Time to value

Emphasize here when first value is delivered.



[Link to full mutual action plan](#)

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### Subject

Pellentesque sollicitudin justo ut orci consectetur, ut porttitor ante pellentesque.

2000

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[Link to full mutual action plan](#)

# Run the Numbers

## Slogan of fixing the problem

30–40 words summarizing the problem and solution.  
Imagine this is the only slide the CFO looks at.

Don't get trapped in detail. Include change management costs too.

Ideally show a range.

### NAME OF PAIN

Cost / Opportunity (annual)	\$23,000,000
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### SOLUTION IMPACT

	Worst case	Best case
Bullet 1 (annual)	\$500K	\$1M
Bullet 2 (annual)	\$250K	\$500K
Bullet 3 (annual)	\$250K	\$500K
<b>Return</b> (first 6 months)	<b>\$100K</b>	<b>\$250,000</b>
<b>Full term</b> (3 yrs)	<b>\$3M</b>	<b>\$2,500,000</b>

### CHANGE MANAGEMENT

	Worst case	Best case
Hours across org	200 hr	100hr
Implementation / PS	\$30,000	\$30,000

### COSTS

	Worst case	Best case
Hours across org	200 hr	100hr
Implementation / PS	\$30,000	\$30,000

# Investment Summary

# That's it!

## If you want to continue growing your revenue..

1. [Follow Clari on LinkedIn](#) to unlock growth and achieving revenue precision
2. [Jump to RunRevenue.Pro](#) for more Precision Playbooks that skyrocket your close rates.
3. [See how Clari's Revenue Platform](#) answers million-dollar questions, so you can stop revenue leak and take back control of your revenue performance