



DEFENDING PRICE IN THE FINANCIAL SERVICES INDUSTRY

Document and Demonstrate the Full Value of Your Offering

MAJOR ACCOUNT MARKETING AND SALES TECHNIQUES FOR PROVIDERS OF:

- *Self-service devices*
 - *Telecommunications networks*
 - *CRM solutions*
 - *Payment solutions*
 - *Servers and network administration solutions*
 - *Account monitoring and compliance solutions*
 - *Teller and platform automation*
 - *Outsourcing*
 - *Systems integration*
 - *Claims processing solutions*
 - *Trading desk architecture*
 - *Storage Solutions*
-

*Participants
receive a copy of
the Financial VQ™
value quantifier - a
spreadsheet-based
sales tool*

**defending
price™**

WHY IS IT IMPORTANT TO DOCUMENT & DEMONSTRATE VALUE?

Suppliers to the Financial Services industry face a challenging sales environment. Customers are more demanding; pricing pressure is increasing, and margins are contracting. Many suppliers have responded by emphasizing the value they offer customers but most find it hard to resist demands for lower prices.

To gain an equitable or fair return on the value their offerings deliver, and thereby be in a position to defend price, suppliers must be able to persuasively demonstrate and document the value they offer, or could offer, in *monetary* terms. Simply put, suppliers must learn to translate everything they do for customers into a language that customers' are most interested in - the language of dollars & cents.

Documenting and demonstrating value is both challenging and rewarding. It is challenging because it involves quantifying benefit claims you want to make - claims that can touch on complex business processes. But it is rewarding for the same reason. Meeting the challenges that come with quantifying and documenting value will give you a powerful competitive advantage over your rivals, as well as allow your company to defend and improve your price and bottom line.

That's why Kotler Marketing Group is pleased to offer this unique training program, developed specifically for suppliers that sell to banks, brokerages, credit unions and other types of institutions. Ample time is spent working with participants to document the value of their specific offerings.

Common Sales Challenges That Are Addressed

- Understanding what value is and how to quantify and measure it
- Using spreadsheet-based sales tools and models that incorporate ROI, TCO, NPV
- Getting customer cooperation and buy-in
- Using value research to strengthen and reinforce customer relationships
- Avoiding exaggerated claims that undermine the credibility of your value case
- Effectively incorporating value analyses and findings into presentations, bids and proposals

Understand how to quantify the value of benefits that vendors typically promote, such as:

- Improving customer satisfaction
- Lowering the cost of handling transactions
- Extending connectivity with exchanges and counterparties
- Reducing risk exposures
- Avoiding duplicative re-keying
- Avoiding failed trades
- Reducing fraud losses
- Improving cross-selling and up-selling opportunities
- Reducing IT infrastructure costs
- Improving organizational flexibility

ABOUT THE FINANCIAL VQ™ SALES TOOL

- Designed specifically for companies that sell to the financial services industry.
- Calculates the key benefits that most vendors want to get credit for.
- Compatible with Windows XP, 2000, and later versions.
- User-friendly and feature-rich

WHAT CLIENTS HAVE SAID:

"We have worked with Kotler Marketing Group for three years. Their instructors are fantastic and the program reviews have been excellent. We're very satisfied and our people are extremely motivated."

—David Porter, VP,
American Express

"The sales tool has helped us close deals and win more business."

—Fran Kester, SVP,
Fidelity National
Information Services

"The Defending Price methodology, formulated by a real understanding of the way customers view investment decisions, provides valuable insight into this subject area"

—Jason Butcher, Head of
Convergence, British
Telecom

Who Has Been Trained?

Adobe
Accurant
American Express Bank
Ascential
Baker Hill
British Telecom
CapitalStream
CheckFree
Cognos
De La Rue
Diebold
EDS
Elan Financial
Fidelity Information Services
Fifth Third Bank Processing
Finaplex
Fiserv
Harland
Getronics
IBM
Investment Scorecard
Jack Henry & Associates
Knightsbridge Solutions
Lawson
Magtek
Metavante
NCR
NEC
NuEdge
NSS Corp
Okidata
Omron
Open Solutions
QAS
Raddon Financial
Raritan
Sanchez
SRC Software
Sun
Sungard
Tibco
Thomson
Unisys
WAUSAU Financial Systems
Web Side Story
Wind River

What You'll Get

Seminar participants will:

- Learn about industry best practices regarding presentations, sales tools, and proposals
- Develop a benefits framework for their products & services
- Draft a research agenda for documenting the value you offer
- Understand how to develop effective value-based sales & marketing collateral
- Receive a copy of the Financial VQ™ sales tool

Who Should Attend

The Defending Price™ seminar is a one day program designed for:

- Sales Managers and Representatives
- Marketing & Product Managers
- Field Sales Engineers
- Marketing and Sales Executives

The Presenters

This training seminar employs the principles of adult learning and uses relevant case examples and exercises. Job aids are also provided to reinforce learning back on the job. The seminar will be lead by:

Barry Deutsch has over 30 years of experience in the banking and financial services industry. He is an experienced marketing and sales strategist and practitioner. Barry has advised and trained leading companies in industries, including, technology, banking, finance, and insurance, about how to build compelling value-based business cases. He has presented on the subject at industry conferences such as TransPay, and is a frequent speaker at ABA and BAI conferences. For a number of years, Mr. Deutsch was a senior bank marketing executive. He served as head of marketing at Mellon Bank in Pittsburgh and Provident National Bank in Philadelphia. He holds a Bachelor of Science in Economics degree and an MBA from the University of Pennsylvania's Wharton School.

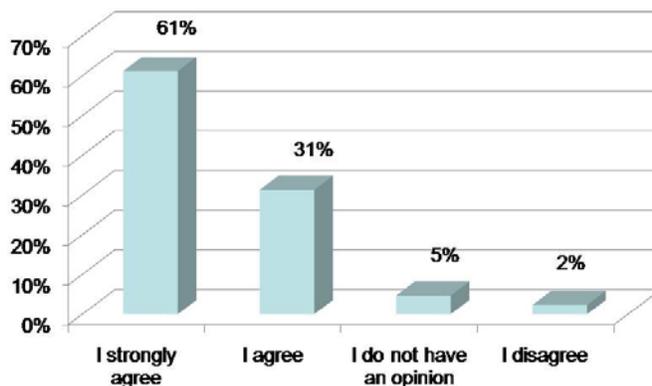
Tony Kotler has considerable expertise in value-based sales and marketing. He has helped companies in a number of different industries - including Financial Services - to build compelling, value-based business cases and collateral. He has presented on the subject at conferences and events and has published articles in a number of magazines including *Marketing News*, and *Selling Power*. He has conducted numerous training programs on this topic, for both Fortune 500 companies and technology startups.

Program Content

9:00 - 9:30 am	Value-Based Sales & Marketing
9:30 - 10:30 am	Industry Issues & How to Quantify Key Benefits
10:30 - 10:45 am	Break
10:45 - 12:00 pm	Constructing a Benefits Framework
12:00 - 1:00 pm	Lunch
1:00 - 2:30 pm	Documenting Your Case - Research Techniques
2:30 - 2:45 pm	Break
2:45 - 3:30 pm	Configuring the Financial VQ™ Sales Tool for Your Solution
3:30 - 4:30 pm	Presenting Your Value Case & Defending Your Price
4:30 - 5:00 pm	Wrap Up

What vendors are saying...

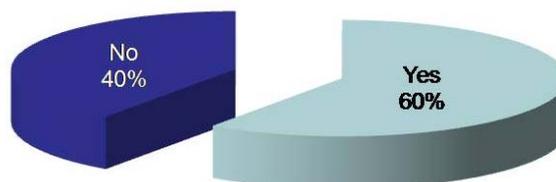
"It's become increasingly necessary to demonstrate to customers and prospects the Return-on-Investment (ROI) of our solutions."



Source: Kotler Marketing Group

What enterprises are saying...

"In your view could vendors be doing more to help you build your business case?"



Source: Kotler Marketing Group

The Defending Price™ Sales Training Series

There are no new negotiating tricks. To be able to resist the demands for lower prices suppliers must be able to articulate the value they deliver in a credible and compelling fashion. Kotler Marketing Group has had success helping our clients do just that. Our clients' results speak for themselves.

Our sales training programs are designed to help companies get a leg up on the competition. Our new and unique training programs:

- Are led by instructors that bring 20+ years of industry experience
- Feature industry-specific case studies and success stories
- Incorporate sales tools and methodologies tailored to the industry

Our training programs can be conducted on-site at your facility and are 1-2 days in duration. They are designed to:

- Teach sales, marketing and pricing personnel how to document the value they deliver
- Use the knowledge of what their products are worth to resist demands for lower prices and discounts
- Successfully package and present their value proposition

For more information on the Defending Price Training Program, or any of our Services, call us at

1-800-331-9110, or visit us at www.kotlermarketing.com