



THE CUSTOMER-CENTRIC FINANCE ORGANISATION

Learn from Sales how you work with and create value for your internal stakeholders

Agenda items

1	HEART OF PARTNERING Why customer-centricity is the very foundation for business partnering.	The relevance for a business partner Most organizations are on a journey from “product-centric to customer-centric”. They build their strategy, culture, processes and organization to meet customer needs. World class finance organizations treat the internal stakeholders as highly valued customers and build the same structures. We show you how.	Participants will be able to... <ul style="list-style-type: none">• Understand the basic principles of a customer-centric operating model and how it can be leveraged by Finance.• Know where they are today in order to make changes going forward.
2	CUSTOMER-CENTRIC OPERATING MODEL Build a high impact organization with your internal stakeholders at the centre.	Here we demonstrate how you implement an “account management” setup in Finance. Using the BPI 5 step model (1) identity and prioritize stakeholders, (2) build the organization, (3) align expectations on account plans, (4), collect feedback and (5) measure customer value.	<ul style="list-style-type: none">• Implement a simple customer-centric way of working in teams and the organization.• Leverage the “trust equation” to actively build better relations with your stakeholders.
3	CUSTOMER VALUE CREATION Learn from the experts in Sales how you create customer value	Lastly, we introduce the “NASA”-model, which is a simple sales model that helps you create value by first clarifying internal stakeholders needs and then building solutions that matches them. We practice the use of the model on an actual stakeholder and demonstrate how the principle of “seek first to understand” can revolutionize your stakeholder dialogues.	<ul style="list-style-type: none">• Drive better stakeholder meetings.• Identifying customer needs through questioning technique and root-cause analysis.• Understand how principles of Design Thinking can be applied in solution design in Finance.

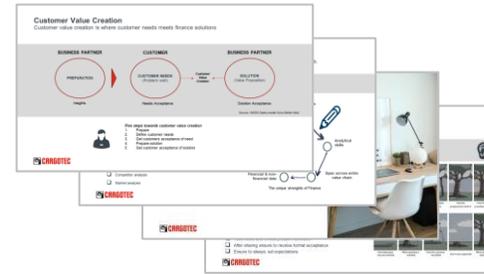


YOUR TOOL BOX

Example of tools that you will take home



Playbook on how you implement a customer centric operating model



Customer value creation toolbox

STEP 1	STEP 2	STEP 3
IDENTIFY YOUR MOST IMPORTANT CUSTOMERS	IDENTIFY YOUR MOST IMPORTANT CUSTOMERS	IDENTIFY YOUR MOST IMPORTANT CUSTOMERS
What are the most important customers?	What are the most important customers?	What are the most important customers?
Why are they important?	Why are they important?	Why are they important?
What are their needs?	What are their needs?	What are their needs?
How do we meet their needs?	How do we meet their needs?	How do we meet their needs?
What are the key metrics?	What are the key metrics?	What are the key metrics?
What are the key roles?	What are the key roles?	What are the key roles?
What are the key processes?	What are the key processes?	What are the key processes?
What are the key metrics?	What are the key metrics?	What are the key metrics?
What are the key roles?	What are the key roles?	What are the key roles?
What are the key processes?	What are the key processes?	What are the key processes?

3 step customer value template



MAKING IT STICK

How we ensure taking learnings from classroom into practical use.

Reflection



Self reflection regarding "internal stakeholders" and what keeps them awake at night.



Before

Practice



Initial steps in creating a customer overview and the main focus areas of the internal stakeholders.



During the training

Implement concept



Use the 3-step customer value model for dialogues with internal customers on needs and solutions.



After the training



BENITA ULLRICHS NILSSON

Partner in BPI



Benita is a seasoned finance professional with a background as a finance leader and management consultant.

From her role as a consultant she has extensive experience with sales and how to run successful customer meetings.

She leverage this expertise to train business partners.



ANDERS LIU-LINDBERG

Partner in BPI



Anders is an experienced business partner, global thought leader and partner in BPI.

As a business partner, Anders has had hundreds of dialogues with internal stakeholders and will share his personal stories and experiences.



TRAINERS

Your facilitators at the training



1/2 - 1 day