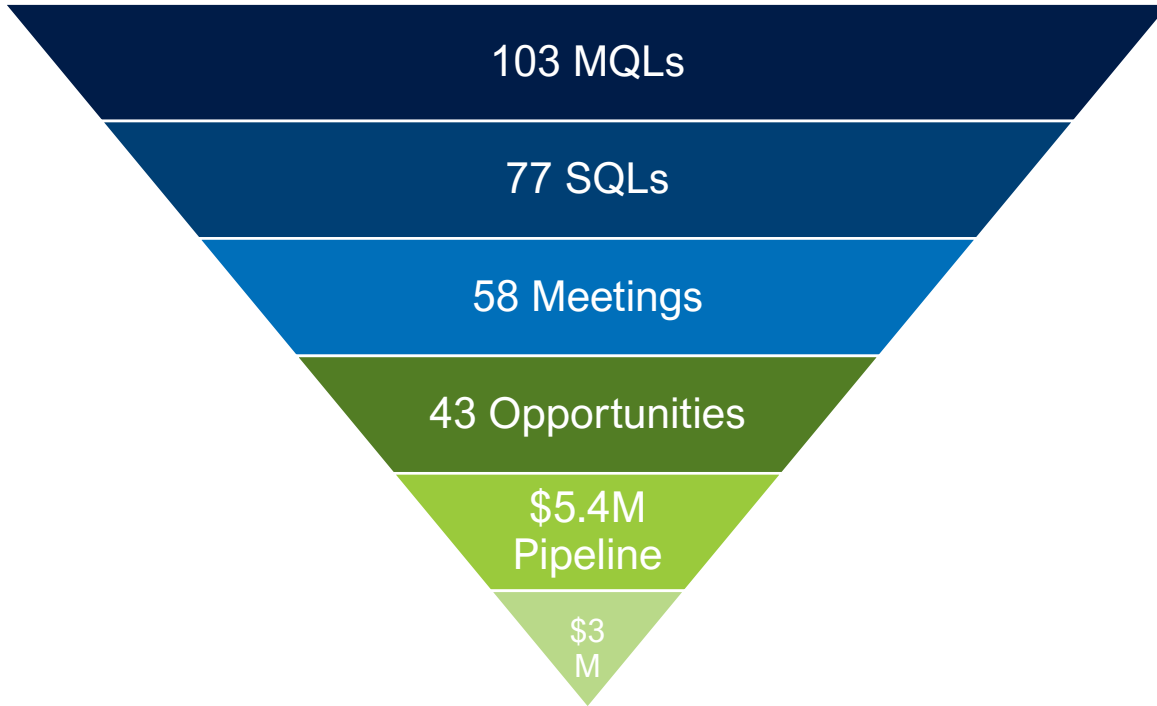


Payments Cross Sell Waterfall



Assumptions:

- 75% MQLs to SQL conversion
- 75% SQLs to meetings
- 75% meetings lead to opportunities
- Need \$5.4M additional pipeline coverage

Campaign Summary

Events

14% contribution targeting
~14 leads

Very payments-heavy focus for 2024 events, particularly in Q1:

- ARMTech (Jan.)
- RMAI (Feb.)
- CRS (May 10-12)
- DCS (Sept.)
- ACA Intl. (July)

Launches/Webinars

33% contribution targeting
~34 leads

Set yourself up for success with one-of-a-kind automation.

- Adoption rates for new enhancements low due to difficulty taking upgrades
- Continue to show enhancements live to clients to push benefits, including ROI
- TCS payments enhancements still to come

ABM Tactics

31% contribution targeting
~32 leads

Targeted ROI communications

- Have not found messaging that lands with current clients. Testing new messaging
- Short-term: monthly savings guarantee
- Long-term: building online ROI calculator
- Targeted outreach to updated client list

Nurture Campaign

22% contribution targeting
~23 leads

Set yourself up for success with one-of-a-kind automation: Key payment integration that is a must have for agencies of all sizes.

- Use average ROI calculations
- Continue to position Finvi as a payments leader
- Google ads: improving effectiveness via improved keywords

Monthly Targets

	Q1				Q2				Q3				Q4			2024	
	Jan	Feb	Mar	Total	Apr	May	June	Total	July	Aug	Sep	Total	Oct	Nov	Dec	Total	Total
MQLs	2	11	15	28	13	10	1	24	6	15	15	36	13	1	1	15	103
SQLs	2	8	11	21	10	7	1	18	5	11	11	27	10	1	0	11	77
Meetings	1	5	7	13	6	5	0	11	3	7	7	17	6	1	0	7	48
Opps	1	3	4	8	4	3	0	7	3	4	4	11	4	0	0	4	30

- Light activity in January.
- Heavy in Feb. and March as we will have several webinars and launch our monthly savings guarantee
- Heavy again in Aug., Sept. and Oct. as we will hold additional webinars and launch full ROI calculator with savings guarantee.

Q1 & Q2 Campaign Overview

MESSAGING

Central Theme: Set yourself up for success with one-of-a-kind automation: Key payment integration that is a must have for agencies of all sizes

Key Messages:

Be prepared to scale with Finvi's native payment platform. Improve operational efficiencies and make it easy for your firm to quickly handle increased payment transactions, including:

- During high volume times like tax season
- If your company offers repayment incentives
- When you onboard several new clients at once
- During economic upturns that enable more consumer to pay debts

Plus, get your money faster with next-day funding. You no longer have to wait 2-3 business for payments to hit your account. Now you can maximize your cash flow.

GOALS

	Targets
MQLs	52
Meetings	29
Opportunities	22
Gross Adds	\$2.7M



Cross Sell Activities & Promotional Channels

Tactic	Activities	Schedule	Promotional Channels				
			Social	eBlast / Email Nurture	Website / Gated / Landing Pg. / Confirmation Pg	CSMs / BDR / Sales Script	Publishing Sites
	Cross Sell Lead Generation & Nurturing (FACS & RM)	Jan. - March	X	X	X	X	
	FACS Webinar (Payments Enhancements Launch)	???	X	X	X	X	
	ARMTech	Jan 17-19	X	X		X	
	Artiva RM Webinar (Payments/ROI focus)	???	X	X	X	X	
	RMAi	Feb. 6-9	X	X		X	
	ABM outreach: Personalized ROI	Mid Feb		X	X	X	
	TCS Webinar (Payment Enhancements Launch)	Early April	X	X	X	X	
	Cross Sell Lead Generation & Nurturing (by product)	April - June	X	X	X	X	
	Collection Recovery Solutions	May 10-12	X		X	X	
	Updated Google/Paid LinkedIn Ads	Jan. - June	X		X		