



# CaseStudy

## NPI Financial at THE CIO FORUM: Engaging at the Top of the Customer Organization



One-on-One Meetings

For NPI Financial – even more than most companies – new customer relationships start at the top. It's CIOs who most clearly understand NPI Financial's value proposition. And it's CIOs who need to discover why the firm's spend management solutions are fundamentally different from what they've encountered before.

"From a marketing standpoint, when we decide where to go, we ask, 'whose one-on-one meetings *really* attract real high-level decision-makers?' CIO events say that all the time, but it's rare to find one where there really are CIOs coming.



Group Meetings

Therein lies the challenge, says Managing Partner Jon Winsett: "It's almost impossible to get any face time with these individuals." Except, that is, at The CIO Forum.

"We were very happy with the level of executives we found at The Forum. That's one major reason we keep signing up. Not only is there an opportunity to have one-on-one time with real IT leaders, but it's *how many* opportunities like that you get. *Last year, we had 43 one-on-one opportunities – and that's just gold to us.*"

### REAL FACE TIME WITH REAL DECISION-MAKERS

"We require high-level decision-makers because that's the level where we're typically brought into the organization," says Winsett. "Our goal for the Forum was to gain an audience with key decision-makers we wouldn't have a chance to meet otherwise: to get face time, engage these people, and have them engage us as soon as possible."

"We were very happy with the executives' attitudes, too. They come prepared for supplier meetings. They're intending to listen – especially since they've read through the list of suppliers and selected their favorites. So you get someone who's engaging with you, who'll actively question you to understand what's valuable about your offering."

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Conference

JON WINSETT  
Managing Partner, NPI Financial

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Mealtime Meetings

**ILLUMINATING DIFFERENTIATORS,  
OVERCOMING MISCONCEPTIONS**  
The Forum's half-hour meetings and opportunities for informal conversation give Winsett time to thoroughly illuminate NPI Financial's differentiators – and clear up misconceptions that some decision-makers may have.

For example, he says, "Sometimes, our value proposition is not easy to understand without 10 minutes of a solid sit down meeting. Common concerns and objections by our prospects are easily overcome once they are able to digest and understand our potential impact. At the Forum, we love the format of a focused one-on-one discussion so that we can ensure the correct message gets across."



Networking

The Forum's format makes communicating a complex sales message "so much easier. So often, elsewhere, you're just trying to get 10 minutes of an executive's time, and if you even get it, you can't keep their attention – they're too busy."



Conference

**SIX NEW CLIENTS -- MANY WITHIN 60 DAYS**  
The proof is in the results. Says Winsett, "we've probably gotten six clients from last year's Forum. We came away with a list of prospects that were interested. And we were very diligent in our followup, while not being too overbearing, of course. And, over the following weeks, there was success."

That success came faster than normal, too. "The first rash of deals came within 20 days; that's compared with 120 days for us normally. So The Forum accelerated our sales cycle for sure."

"We liked The CIO Forum so much, we've *not only* signed up to be back next year: since many of our customers are on the transportation side of the business, we've signed up for The Logistics and Supply Chain Forum, too."

THE CIO FORUM INDUSTRYWIDE and THE CIO FORUM FINANCIAL SERVICES are the premier events connecting senior IT executives at leading North American companies with the world's leading suppliers of IT products and services. Senior enterprise technology executives who meet stringent qualification standards are invited to participate in a strategic conference program tailored to address their most urgent business challenges. They spend two days and three nights networking with executive-level colleagues in a luxurious, distraction-free environment. These executives also meet one-on-one with the suppliers of their choice, enabling them to access and rapidly evaluate the field's highest value solutions.

THE CIO FORUMS will take place from May 6-9, 2007 onboard the Norwegian Dawn, sailing from New York City. To learn more about participating as a supplier, please contact GRACE LAMBERT 212.651.8749, [glambert@richmondevents.com](mailto:glambert@richmondevents.com) [www.cioforum.com](http://www.cioforum.com)