

## Phone Outbound – CFO Lens

### Typical CFO Scenario (Context)

You are usually calling a CFO when:

- cost, ROI, or payback is in question
- capital allocation discipline matters
- operational pain has financial consequences
- prior initiatives have failed or overrun

CFOs are not anti-innovation. They are anti-**unjustified risk**.

Their core question is:

“Is this a responsible use of capital and attention?”

### Primary Scenarios for CFO Calls

Most CFO phone calls fall into one of these:

#### **Scenario A – Cold but Financially Relevant**

No relationship yet, but clear financial impact or risk exposure.

**Goal:**

Test financial relevance and earn permission to explore economics.

#### **Scenario B – Warm or Referred**

Introduced via CEO, COO, or Ops with implied relevance.

**Goal:**

Validate assumptions and frame financial decision paths.

### Scenario C – Re-Engaging a Stalled Finance Review

Previous evaluation paused, deferred, or deprioritised.

**Goal:**

Clarify what stopped momentum and decide whether to proceed.

### CFO Lens – What They Optimise For

CFOs typically optimise for:

- return on invested capital
- payback period and cash impact
- downside risk and failure modes
- predictability of outcomes
- simplicity of financial decisions

They are sceptical of:

- vague benefits
- future-state promises
- hidden cost creep
- “strategic” language without numbers

Respect comes from **clarity**, not enthusiasm.

## Conversation Spine (Not a Script)

Think in **four movements**, just like the CEO framework. Same spine, different lens.

### Movement 1 – Financial Relevance Check (Opening)

Purpose:

- establish financial context
- earn attention
- avoid premature pitching

Effective openings:

- name a **financially visible problem**
- anchor to cost, waste, or risk
- ask permission to continue

Example patterns:

- “We work with organisations where a small operational issue quietly creates a disproportionate cost impact. Worth a quick check if this is financially relevant for you?”
- “Quick call to sanity-check whether this has enough financial impact to even be worth a conversation.”

Fast disqualification is still a success.

## Movement 2 – Decision Framing (Middle)

Purpose:

- simplify the financial decision
- reduce perceived risk
- avoid feature discussion

Effective framing with CFOs:

- present **two credible financial paths**
- contrast speed vs certainty
- make trade-offs explicit

Pattern:

“What we typically see are two ways organisations approach this.

One prioritises fast payback with minimal capital risk.

The other prioritises full automation with higher upfront investment and longer payback.”

This frames evaluation, not selling.

## Movement 3 – Proof as Financial De-Risking

Purpose:

- demonstrate predictability
- show downside protection
- avoid upside exaggeration

Good proof for CFOs:

- includes timeframe
- references cost avoidance or efficiency
- shows optionality (not lock-in)

Avoid:

- best-case scenarios
- hockey-stick growth
- overly precise projections early

One solid reference point is enough.

## Movement 4 – Next Step or Exit (Close)

Purpose:

- reach financial clarity
- avoid endless evaluation loops

Good closes:

- propose a **working session**, not a demo
- explain exactly what numbers will be reviewed
- give an easy “not now” exit

Pattern:

“If this is worth evaluating properly, the next step is a short working session to walk through costs, payback ranges, and risk scenarios.  
If not, happy to leave it there.”

A clear no protects time on both sides.

## Common CFO Objections – How to Interpret Them

Objection	Usually Signals
“We don’t have budget”	Priority or payback unclear
“What’s the ROI?”	Decision framed too early
“We need full integration”	Risk avoidance or prior failures
“We’re cutting costs”	Cash sensitivity, not rejection
“Send me numbers”	Trust not yet established

Objections are **feedback**, not resistance.

## Quality Check (After the Call)

After a CFO call, ask:

- Did I clearly frame the financial decision?
- Did I respect risk sensitivity?
- Did I avoid premature precision?
- Did we reach clarity?