

CFO LETTER TEMPLATE



INCLUDE YOUR

1. Company
2. Solution
3. ROI details

[examples provided in brackets for guidance]

Your champion will use this to present to their CFO. The goal is to enable your champion to clearly convey why they should move forward now in language that will resonate with budget holders.

Hi **[CFO Name]**,

As we begin to implement **[STRATEGIC INITIATIVE]**, I'd ask that you approve the purchase of **[PRODUCT/SERVICE]** from **[YOUR COMPANY]**.

[YOUR COMPANY] addresses three areas of opportunity for [STRATEGIC INITIATIVE]:

1. **Improved [AREA OF OPPORTUNITY]:** Explain how your product or service will generate gains for their organization.
2. **Reduced [COST OR INEFFICIENCY]:** Outline which areas of concern will benefit from implementing your product or service.
3. **[STRATEGIC OUTCOME]:** Add the two together to spell out a clear statement of the high level impact for the business.

[YOUR COMPANY] is the best [PRODUCT/SERVICE] to address these issues head on:

- **Productivity** of our team is top of mind. No other solution can **[DETAIL HOW YOUR OFFERING UNIQUELY MAKES YOUR CHAMPION MORE EFFECTIVE]**.
- **Visibility:** **[YOUR COMPANY]** can quickly pinpoint **[DETAIL WHERE VISIBILITY IS LACKING AND THE NEGATIVE IMPACT IT'S CAUSING]**.
- **Agility:** With this purchase, we'll be able to **[DETAIL HOW YOUR SOLUTION WILL ENABLE THEM TO MOVE AND ADAPT FASTER AND THE OUTCOME IT WILL PRODUCE]**.

[YOUR COMPANY] is being used by [INSERT RELEVANT COMPANIES] to do the above with very positive reviews.

We are looking to make an investment of \$XYZk, which would cover and equip our entire **[FUNCTION]** organization.

If necessary, I am willing to re-allocate **[OTHER BUDGET LINE ITEM]**, which would pay for **[YOUR COMPANY]**.

Let me know if you have any questions, happy to provide more context.

- **[CHAMPION'S NAME]**