

D&B Solution Training

Kevin Gallagher and Bob O'Brien

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Agenda

- Review D&B processes / Roles – 5 minutes
- Main differences between D&B and all other data providers – 5 minutes
- Demo on D&B Finance Analytics and question to ask your members – 25 minutes
- D&B new Risk Intelligence - High Level Overview and Questions to ask your members – 5 minutes
- D&B solutions outside Risk and referral program – 5 minutes
- Q&A – 15 minutes

D&B Processes

- All leads must be submitted via the lead link below. Ask you member the following 2 questions: Are you an existing D&B customer (if yes, do not submit lead) Are you currently working with D&B directly? (if yes, do not submit lead)

<https://www.dnb.com/forms/nacm-lead.html>

- All emails to Kevin should have Bob cc'd ; All emails to Bob should have Kevin cc'd (if one of us is out, we want to make sure we can handle the issue)
- Once you start an email chain with us, DO NOT create a new email string!! (we need complete history of email and when it goes into a new, it is very hard to find original)
- Questions on getting usage / password adds or resets/ billing issues all go to SmallBusinessOnlineSalesTeam@DNB.com - not to Kevin or Bob (subject line should have NACM – Customer name / duns#) Please provide detail when making request)
- Questions on a Renewal or New business go to Kevin (copying Bob)
- Questions on commissions go to Bob but must come from NACM leader – not from reps
- If you are looking to add users onto an existing contract that are from a different part of the company (subsidiary, sister company etc.. – These must be cleared by Kevin before sending into mailbox. We need to make sure they don't have an existing contract with D&B as we might need to add \$'s onto existing contract.

D&B Roles

Kevin – All new Business / Renewals / Leads / Demo's/ Billing Issues

Bob – Commissions / Webinars/ Website content / Overall Strategy of Partnership

Small Business Team – Usage / Password resets/ adds/ billing issues

D&B vs Competition

- Only Data company in the World to have 470 million records accessible via one login
- 5 million updates per day – no other provider close to this
- 2 Billion trade experience per year processes - no other provider close to this
- Alerts/ monitoring included in 1st year at no additional costs (year 2 – portion of report costs if they would like to continue monitoring only
- Only Data company in the world to provide alerts/monitoring Globally in over 200 countries via single sign on
- Access to the Best 2 Partners in the World – Priceless!!! 😊 😊

D&B Finance Analytics Demo / Questions To Ask a Member.....

- New in 2020
- Only Global data platform that has data built in and updated Daily!
- Demo

How does this Solution help your Members?

D&B Receivables Intelligence Suite



Collections

- Dashboards and Workflows
- Risk-based Prioritization
- Automated Emails
- Dispute Management
- Custom Invoice Formats
- Downloadable Invoices
- Integration with 3rd Party ERP Applications

Cash App Management

- Intelligent Matching
- Email Remittance
- Batching Controls
- Bank Reconciliation
- Split Checks, Consolidated Billing, Discounts, Deductions
- Lockbox Link
- Integrated OCR

Payment Portal

- Online Payment Portal
- ACH/Electronic Payment
- Credit Card Payment

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D&B Risk Intelligence

- New 2020
- Referral Model
- Integration for full suite is approx. 1/3 the costs of other companies in this space (High Radius etc..)
- Opportunities for upsell of DNB core modules (if you refer to another provider you lose on this part)
- Shows your members that want to help solve other business issues other than just Credit Reporting

D&B solutions outside Risk Solutions

- Hoovers – Sales and Marketing Solution that allows companies to model existing customers and find qualified Prospects and apply risk
- Referral Model
- Integration for full suite is approx. 1/3 the costs of other companies in this space (High Radius etc..)
- Opportunities for upsell of DNB core modules (if you refer to another provider you lose on this part)
- Shows your members that want to help solve other business issues other than just Credit Reporting
- Supply Chain – Supplier Risk is critical these days
- MDM – Master Data Management (many companies has many different systems that are not linked to each other. D&B can clean up duplicates and provide linkage to show family trees)

Q & A

Thank you for your time – we are always here to help you and your members!