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Fusion of Banking & Fintech
Catalyst Consulting Group

CONTRACT NEGOTIATION INSIGHTS



Patricia Valentino

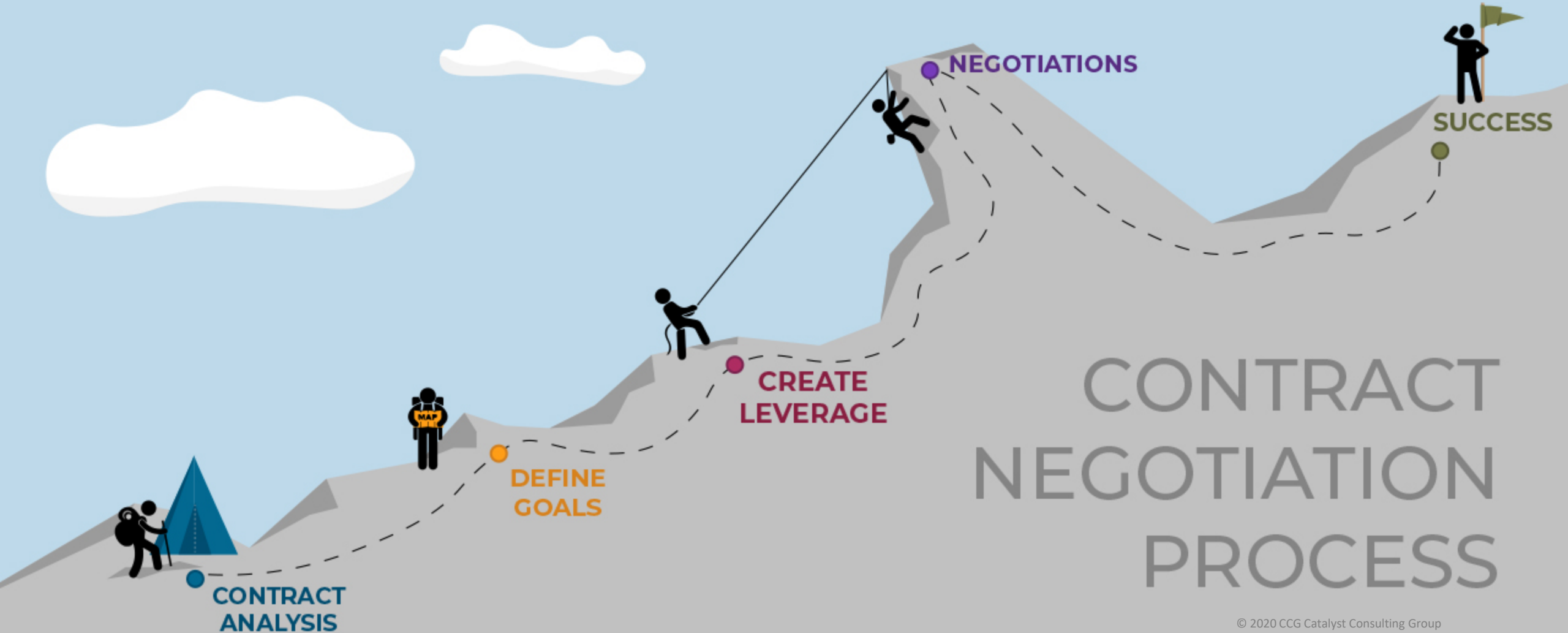
PRINCIPAL & CHIEF RELATIONSHIP OFFICER



Samitha Moodley

CONSULTANT

SPEAKERS



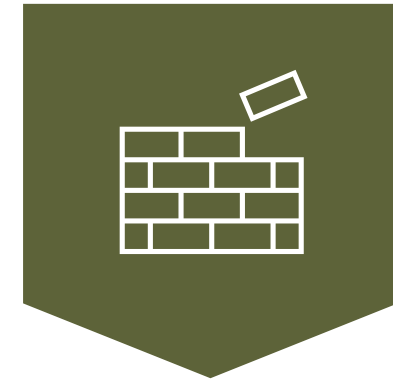
KEY TAKEAWAYS



UNDERSTAND THE DIFFERENT TYPES OF THE CONTRACT NEGOTIATION AND COMPONENTS IN THE PROCESS.



PROVIDE INSIGHTS TO ASSESS, DEFINE AND PRIORITIZE WHAT IS IMPORTANT AS AN OUTCOME.



ALLOW YOU TO BUILD A FOUNDATION TO MEET YOUR CONTRACT OBJECTIVES.



ARE ALL CONTRACTS OPEN TO NEGOTIATION?

- What do I want that I don't have?
- What do I have to give?
- What does the other side have to gain/lose?
- Why would either party open a long-term contract?



BUT THESE VENDOR CONTRACTS ARE SO ONE SIDED!

- Contracts are your framework for managing:
 - Price Changes
 - Service Quality
 - Innovation
 - Risk
 - Reputation

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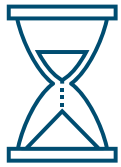
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STEP 1: ANALYZE YOUR CONTRACT



CONTRACT
ANALYSIS

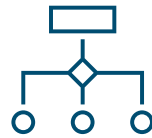
WHAT'S IN MY CURRENT CONTRACT?



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ONGOING
SUPPORT



MERGERS AND
ACQUISITIONS



NEW PRODUCT
PRICING



PRICE
ADJUSTERS



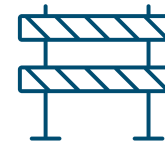
LIABILITY



SUPPORT FOR
INTRODUCING
INNOVATIONS



ABILITY TO USE
3RD PARTIES'
PRODUCTS



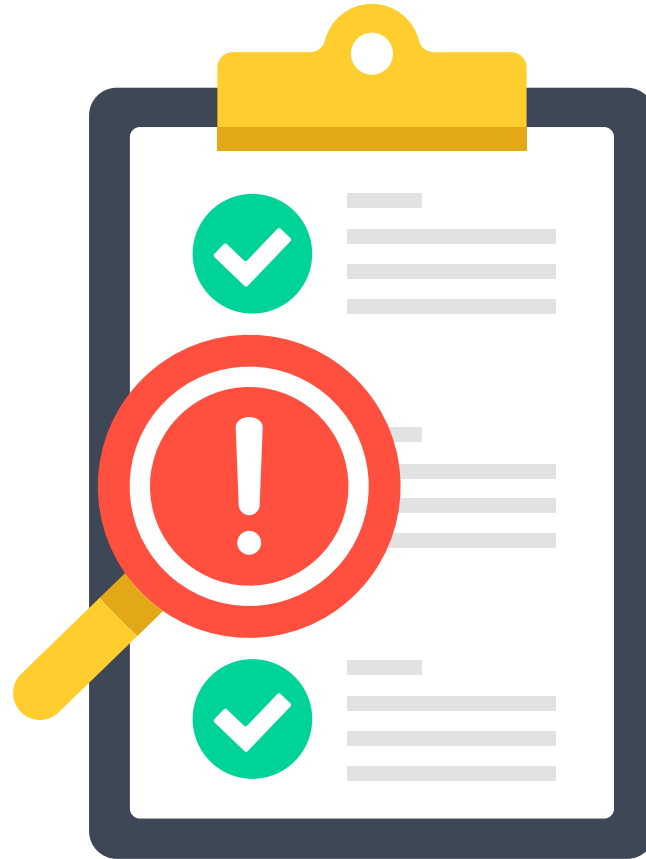
RISK



PRODUCT/CONTRACT
INTERDEPENDENCIES

PROBLEMS WITH CURRENT CONTRACTS

FINANCIAL
INSTITUTIONS



VENDORS

DOCUMENT WHAT YOU HAVE



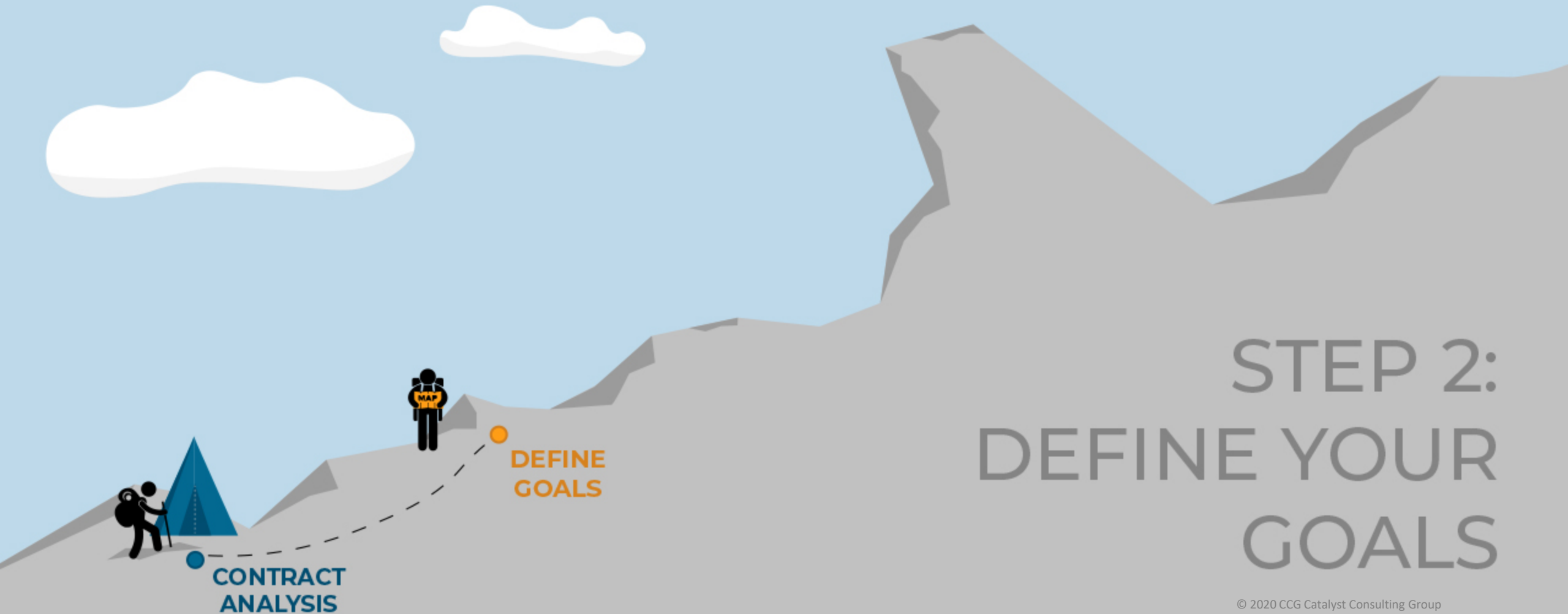
- General Terms
- Product Schedules
- Service Levels

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STEP 2: DEFINE YOUR GOALS



CONTRACT
ANALYSIS

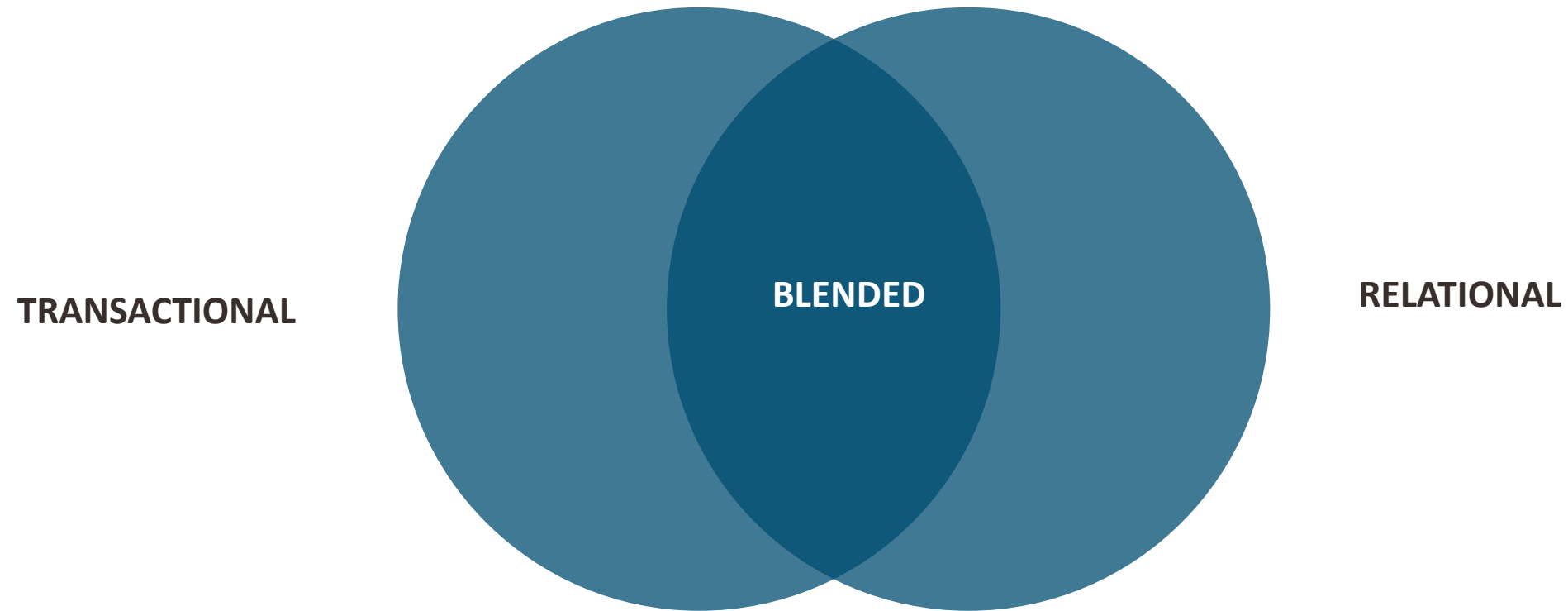
DEFINE
GOALS

FI'S STRATEGIC GOALS



- Grow Asset Size
- Improve Profit Margins
- Streamline Innovation
- Enhance Business Strategy
- Develop Technological Literacy
- Increase Efficiency

WHAT IS THE CONTRACT GOAL?

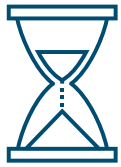


WHAT ELSE SHOULD I CONSIDER?

What is and isn't working with your current contract?



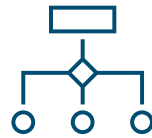
WHAT IS MOST IMPORTANT TO YOUR SUCCESS?



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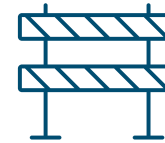
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RISK



PRODUCT/CONTRACT
INTERDEPENDENCIES

WHY YOU SHOULD NEGOTIATE



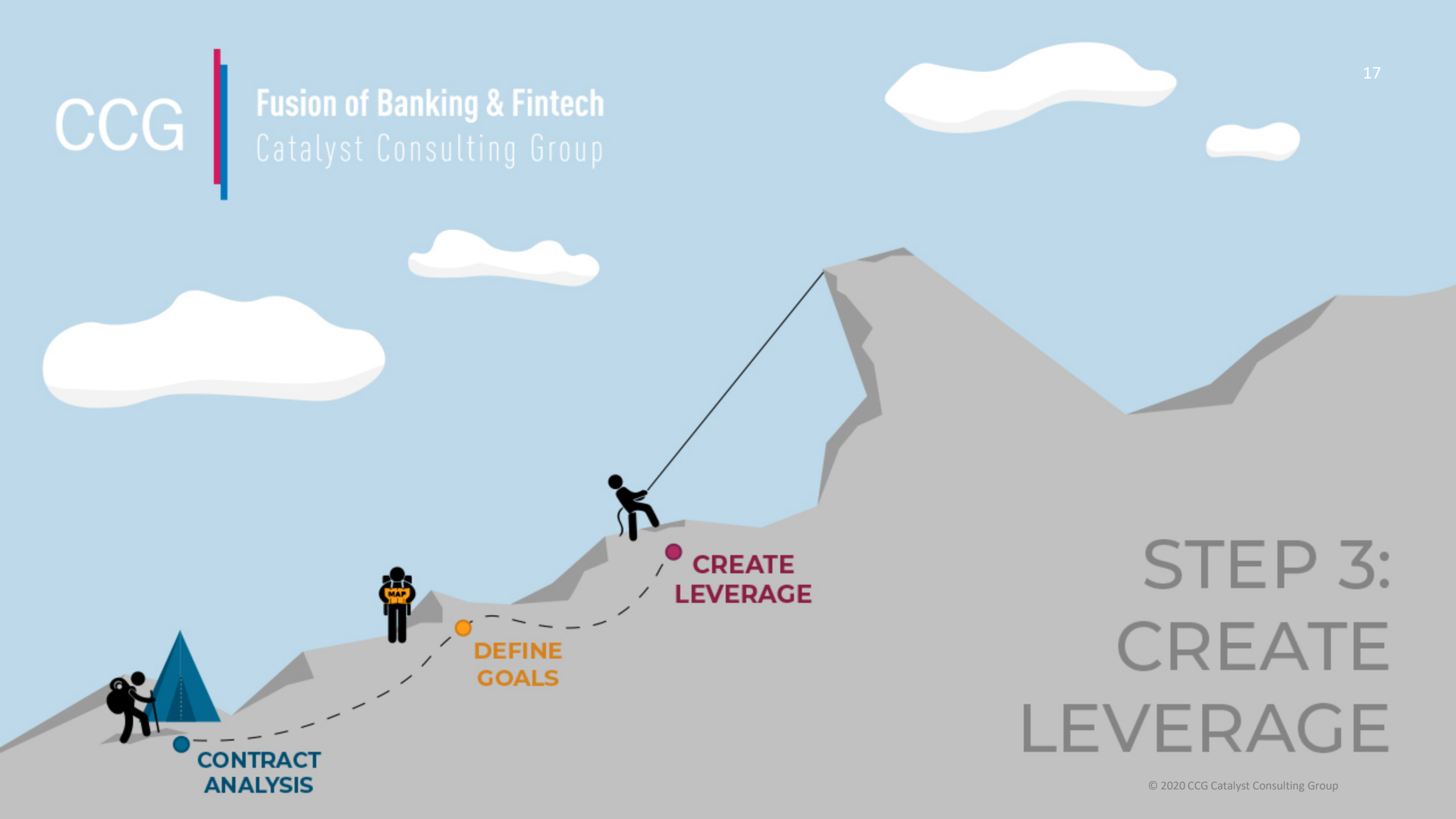
EXISTING NEED



CHANGE IN STRATEGY



CHANGE IN THE MARKET



CONTRACT
ANALYSIS

DEFINE
GOALS

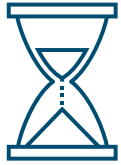
CREATE
LEVERAGE

STEP 3:
CREATE
LEVERAGE

WHAT ARE THE VENDORS WILLING TO NEGOTIATE?



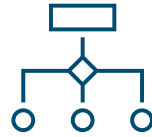
PRIORITIZE WHAT IS MOST VALUABLE TO YOU



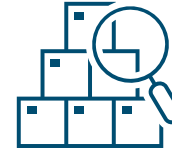
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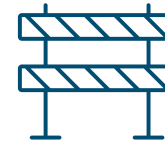
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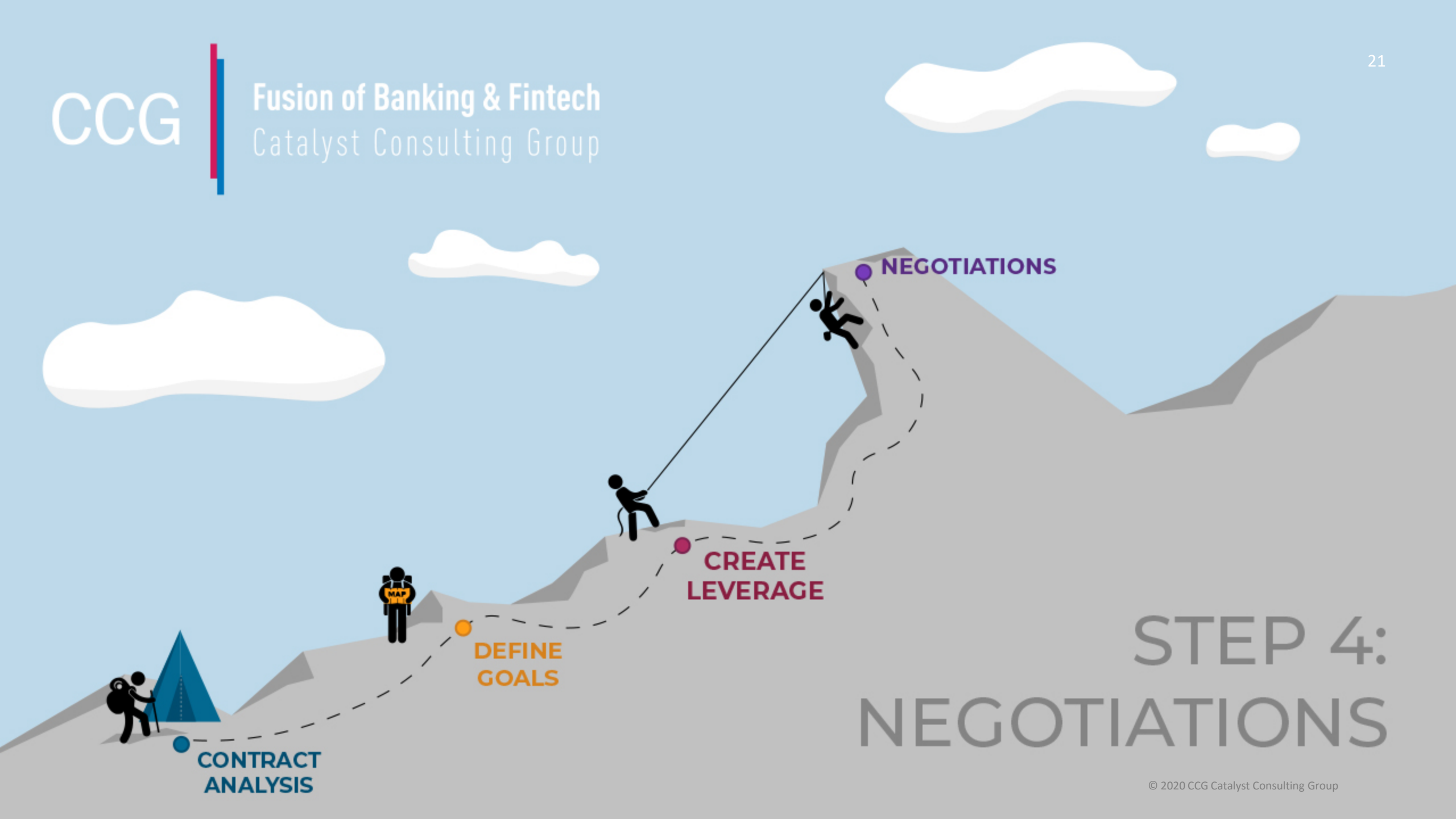
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PRODUCT/CONTRACT
INTERDEPENDENCIES

DEFINE YOUR LEVERAGE





CONTRACT ANALYSIS

DEFINE GOALS

CREATE LEVERAGE

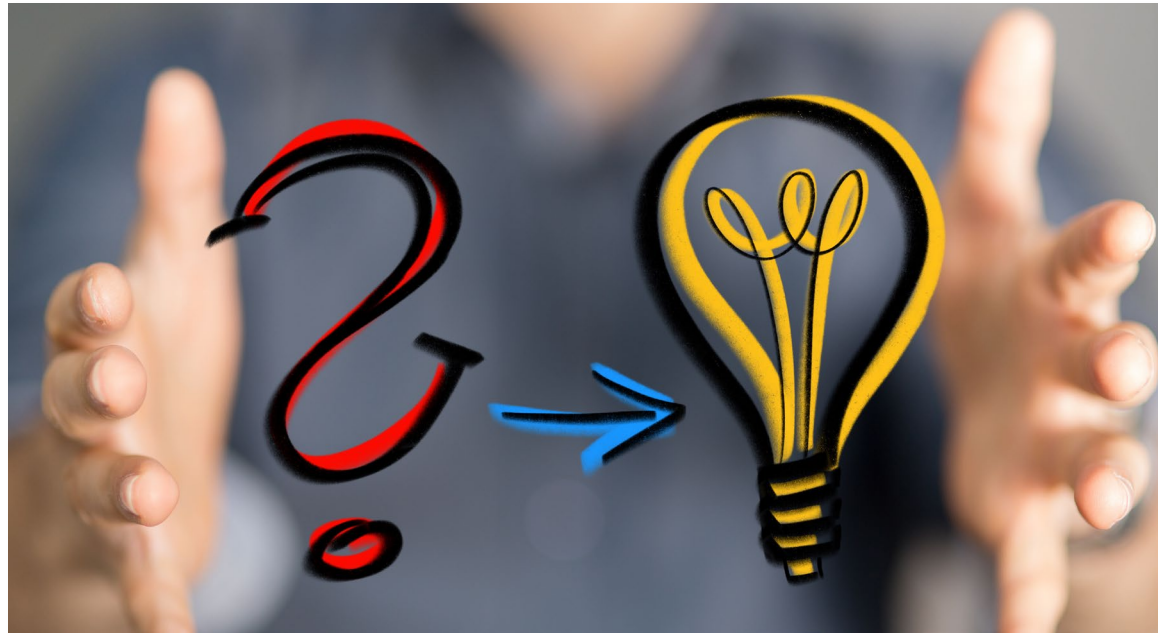
NEGOTIATIONS

STEP 4: NEGOTIATIONS

NEGOTIATIONS



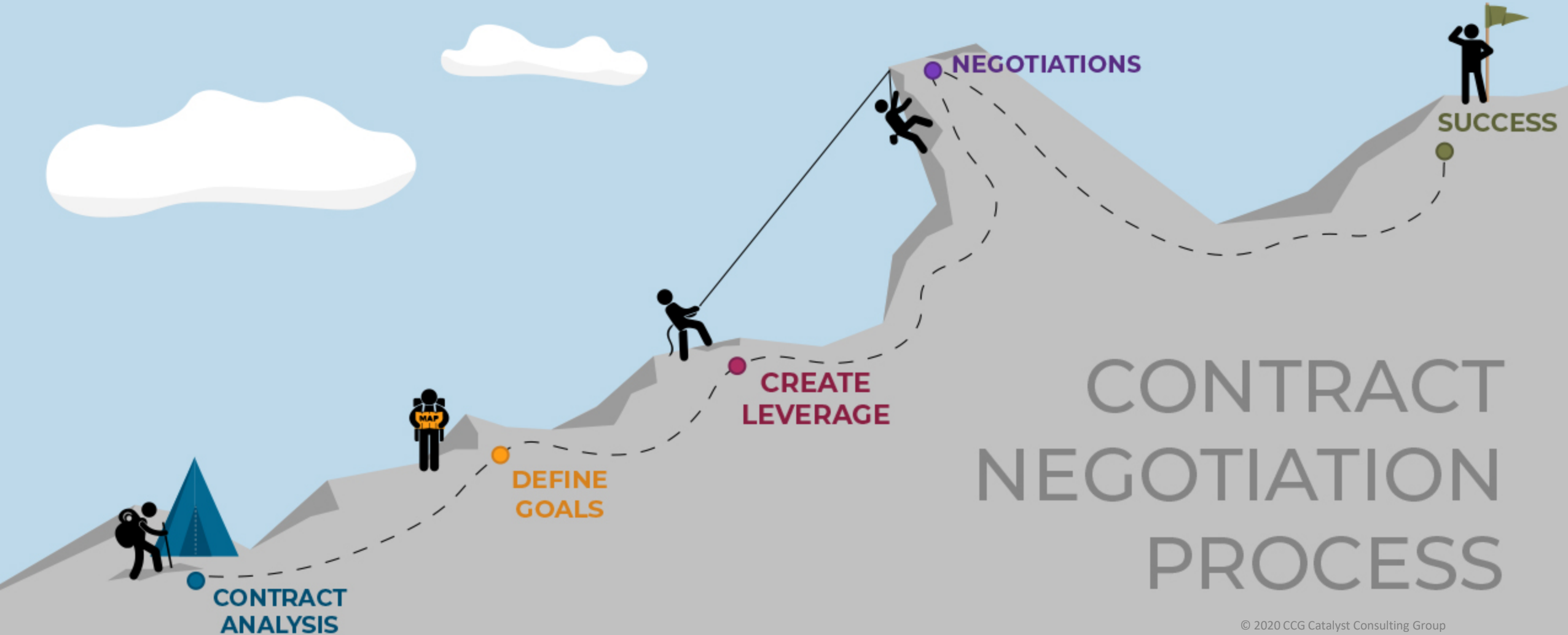
POINTS TO CONSIDER



WHY CCG CATALYST CONSULTING GROUP?

- Knowledge of market trends
- Decades of industry experience
- Negotiates contracts on daily basis
- Maintain positive relationship between you and the Vendor







Is your contract nearing its expiration?

Do you need to know what terms are right for your organization?

Contact us below, our contract negotiation experts are here to help!

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