

# WHERE DO YOU STAND AMONG YOUR PEERS REGARDING DIGITAL INVESTMENTS?

Lisa Balter Saacks,  
Head of Business Development



Tuesday, November 6, 2018



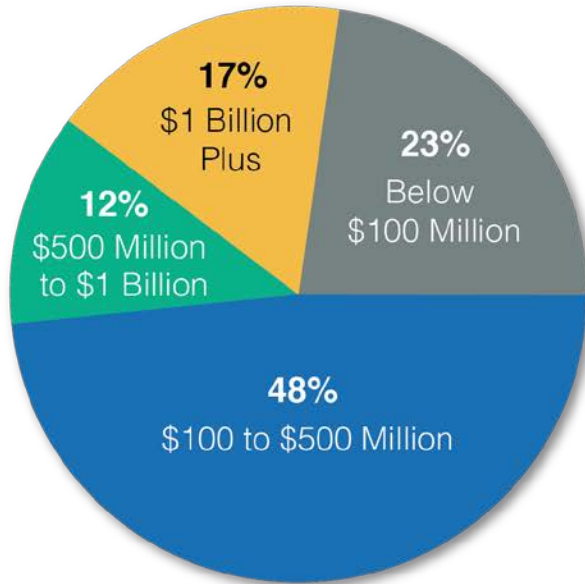
# Lisa Balter Saacks

Head of Business Development, BlueTarp

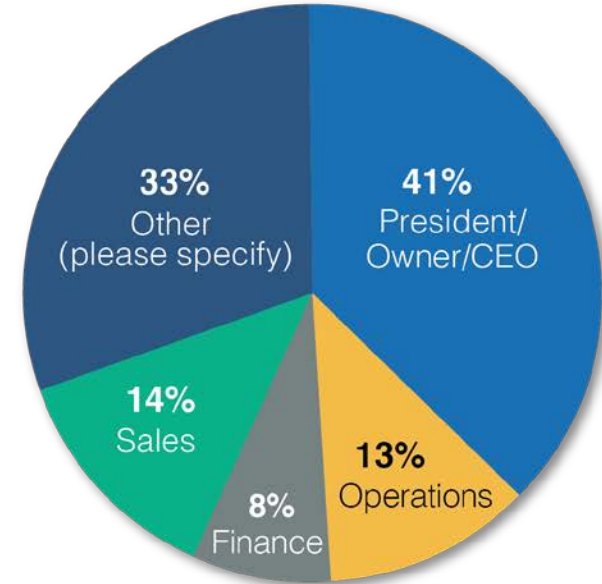
- Over two decades of business development experience in B2B FinTech and banking
- Leadership roles at Gust and SecondMarket
- The New York Business Journal honoree for its Women of Influence Award

# Survey Participants

## Annual Sales



## Role



March 2018; Online survey of NAW membership; 119 respondents

# Key Insights



**What is driving distributors to seek digital investments?**



**How aligned are customer needs with distributor plans for digital improvements?**

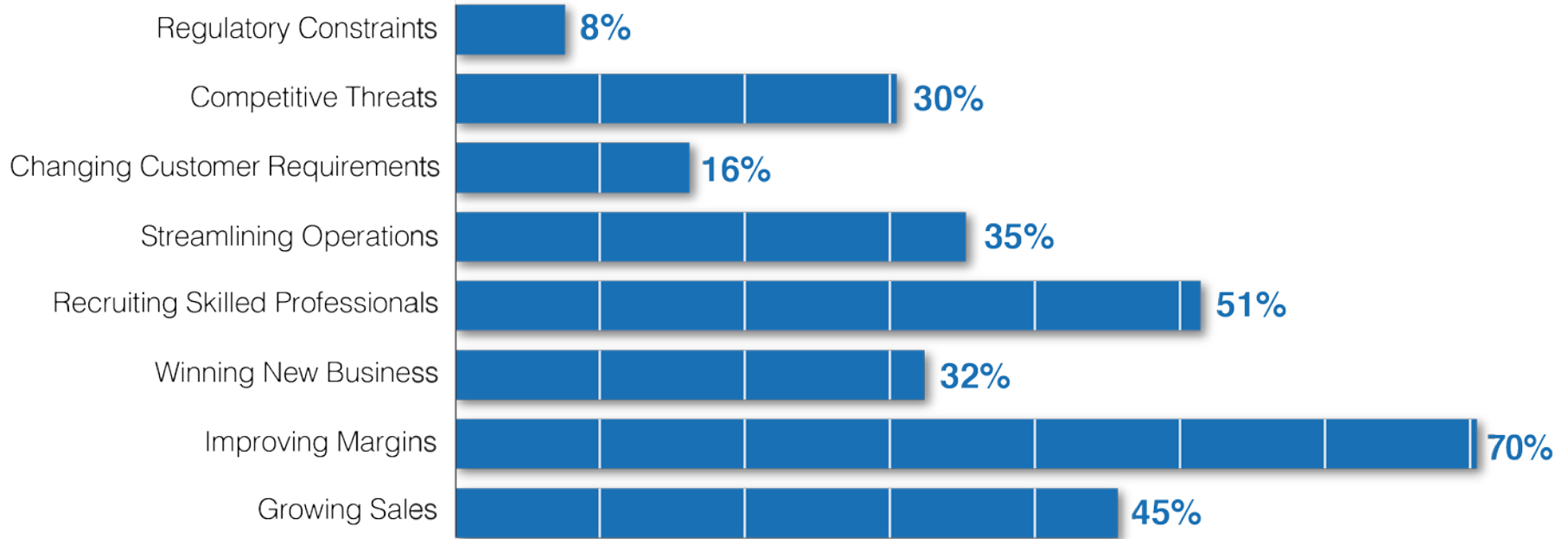


**How are distributors planning to digitally improve their businesses in the next 1–2 years?**



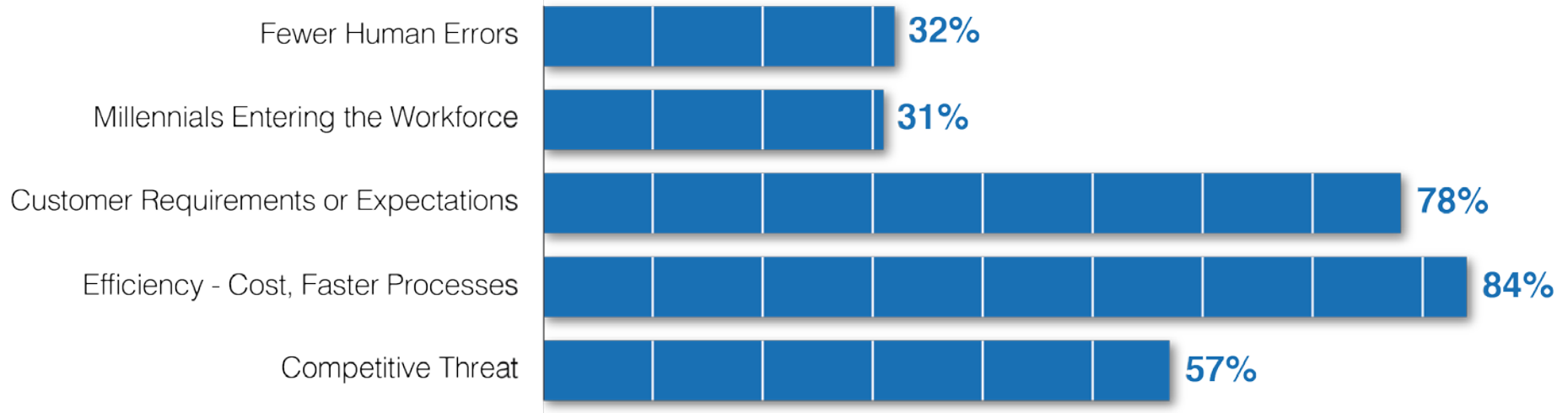
**How are distributors planning to meet customer requirements in the Order-to-Cash process?**

# What Are the Biggest Challenges Facing Your Business Today?



NAW member survey, March 2018

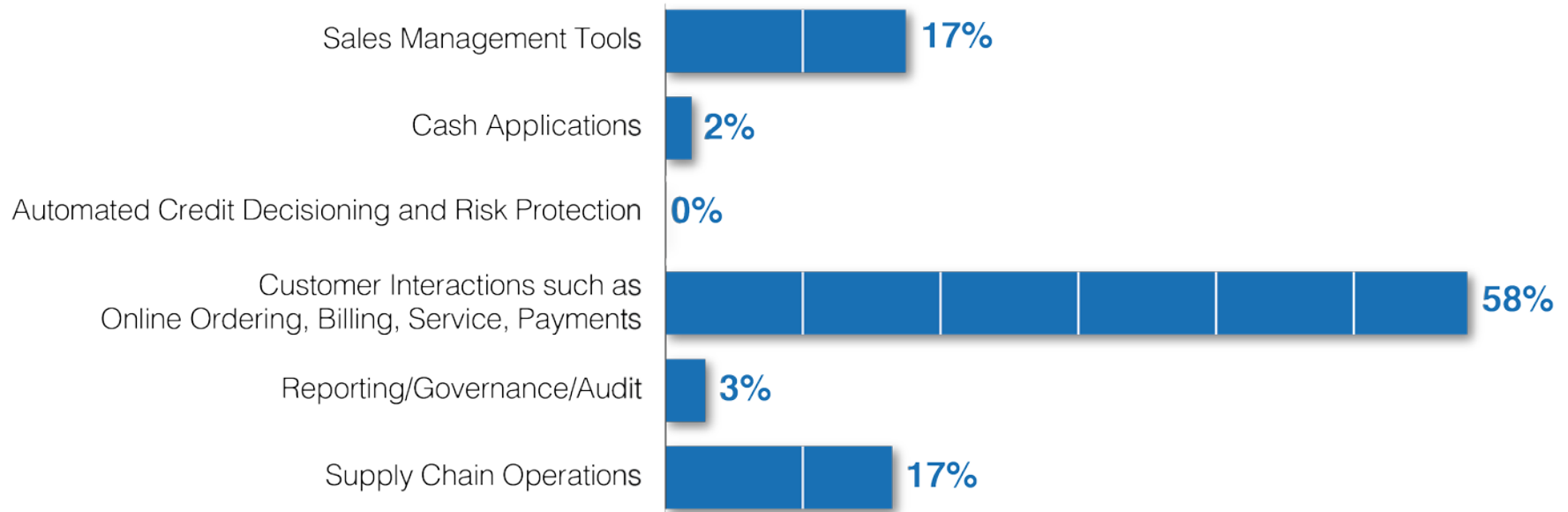
# What Are Your Biggest Drivers Causing You to Seek Digital Improvements?



NAW member survey, March 2018



# What Areas of Your Business Do You Plan to Improve with Digital Enhancements in the Next 1-2 Years?



NAW member survey, March 2018

# Improving the Order-to-Cash Process



**Credit  
applications  
& approvals**



**Billing,  
payments  
& collections**



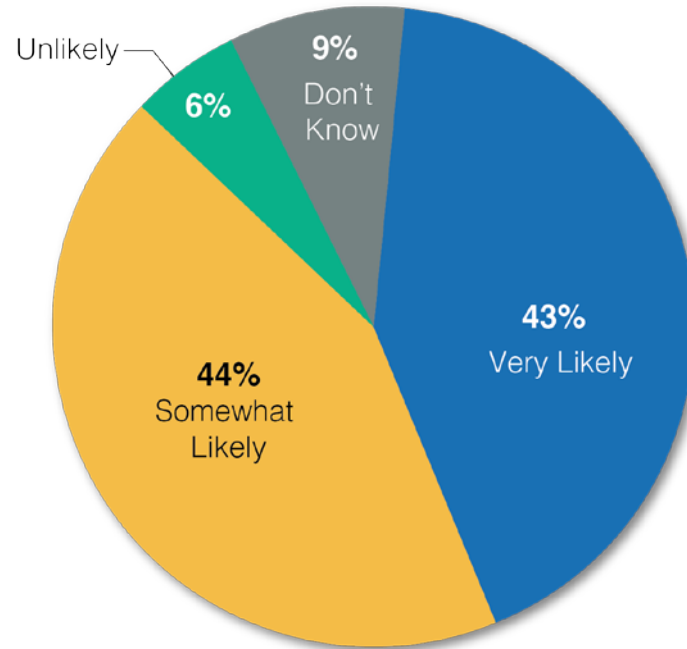
**Cash applications**



**Ongoing risk  
monitoring**



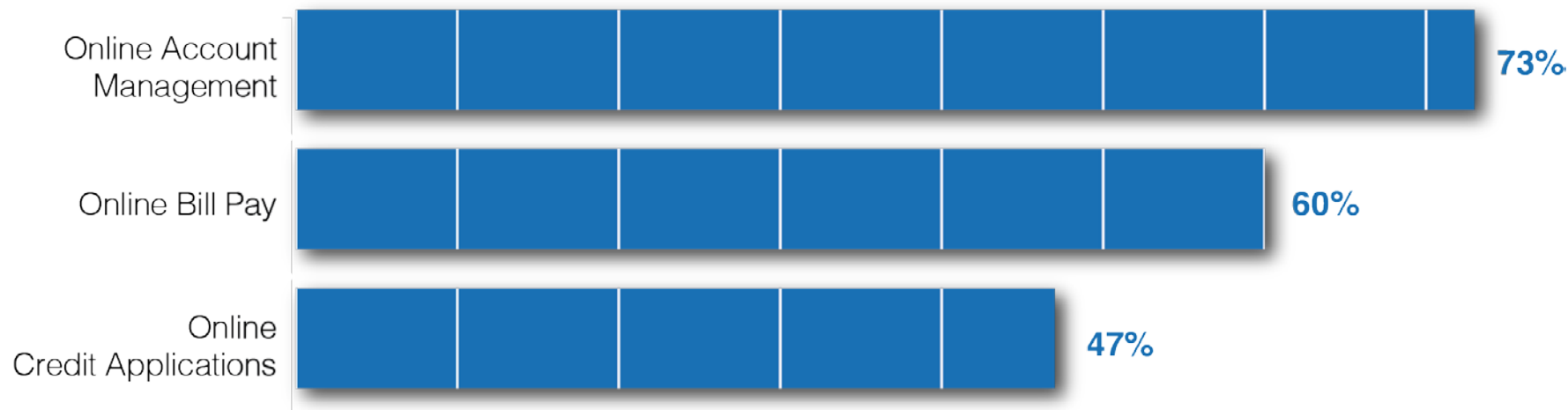
# How Likely Are You to Make Digital Investments in the Order-to-Cash Process in the Next 1 to 2 Years?



NAW member survey, March 2018

# Customers Looking for **Broad Online Capabilities**

**Which areas do you see customer demand for digital improvements?**



NAW member survey, March 2018

# Top Three Areas of Digital Enhancement Planned in the Next 1-2 Years

12%



**Online Credit  
Applications**

33%



**Online Bill Pay**

11%



**Online Account  
Management**



# Improving the **Credit Application Process**



## **Old Way**

- Paper applications are inconvenient
- Approval process is too slow
- Ability to purchase is delayed



## **New Way**

- Easy, fast online credit app
- Real-time risk assessment and credit decision
- Instant ability to buy



# Accelerate Offline and Online Sales

**YOUR LOGO  
HERE**

Commercial Credit Application

Please fill out the fields below to apply for a credit account.  
If, for whatever reason, you accidentally close out of your browser, you can access this application again through your initial email invite. The link will be valid for 60-days.

Tell us about you ✓

Tell us about your business

Your billing info

Your authorized purchasers (optional)

ADD PURCHASER

First Name

Middle Name (optional)

Last Name

Suffix (optional)

+ Add this purchaser

+ Add self

AUTHORIZED PURCHASERS

You have not added any authorized purchasers.

We've got you covered.

Phone

888-321-6698

Monday - Friday, 7am - 8pm

Saturday, 8am - 5pm (ET)

E-mail

[help@yourprogramaddress.com](mailto:help@yourprogramaddress.com)



Make Sure  
to Build in  
**Fraud Warnings**

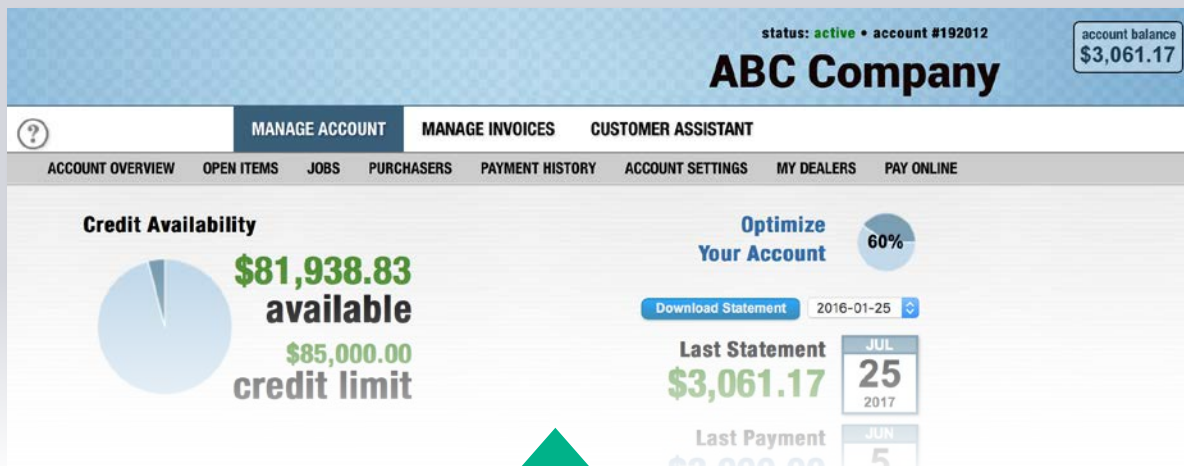


# Achieve 80-90% Instant Decisions





# Online Account Management



## Your Customers Want the Ability to:

- Download a statement
- View past purchases
- Make a payment online
- Request more credit
- Dispute a charge

# Three Ways to **Meet Your Customers' Expectations**



**Online Credit**  
Applications



**Online Bill Pay**



**Online Account**  
Management

# Thank you

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***BlueTarp***<sup>®</sup>