



English Roleplay – Seller’s Guide

Information for the Seller

Background:

You are a Commercial Account Manager for PayCargo, the number one logistics payment platform that streamlines and optimizes the payment processes for logistics companies. Your primary role is meeting with medium to large-size companies to identify their payment and reconciliation process and pitch the PayCargo solution to increase efficiency in those areas.

You have recently been assigned a new account, **GlobalTrans**, a large international freight forwarder using PayCargo for the last 3 months to pay various vendors. After a call to the office, you find out the point of contact will be Andy Smith, the CFO for **GlobalTrans**. They are preparing for the month-end close and could only get you a fifteen-minute meeting slot on Friday.

In preparation for the call, you conduct some research into **GlobalTrans** and find out the following:

- On average, the company is making 200 payments through the PayCargo platform per month.
- They have six offices across the United States, including the HQ.
- A well-established company with over 20 years in the freight forwarding business.
- They’ve just secured a contract with a large client and are expecting an increase in business and payments.
- The reconciliation and accounting are all managed by the HQ. However, there are challenges in reconciling branch office payments.

Seller’s Goals

During your fifteen-minute call, your goal will be to identify the following:

- Build rapport with Andy and learn about GlobalTrans.
- Discover problems:
 - Information and details about their payment and reconciliation process.
 - Learn what companies they are paying, including payment methods used.
 - Is there any resistance to use your services.
- Schedule a second meeting to continue the conversation and present a solution.