

Discussion Document

XXX Prospect & YYY Fintech Company

Prepared by

XXX

Date

Introduction

Dear XXX Team,

It was a pleasure meeting with you yesterday and getting to understand your business and how you care for your employees.

I have prepared this brief discussion document to summarize our conversation and identify next steps. The document is designed to be collaborative, so please feel free to comment, amend, or correct anything that I don't have right. This will leave us in the best position to determine if a collaboration makes sense for both of us.

We are really looking forward to working with you and XXXX !

Sales Representative

Meeting on [Date]

by Video/address

XXX:

- Name - Title
- Name - Title
- Name - Title
- Name - Title

Paymenow

- Name - Title

Context

XXX and Fintech Startup were introduced by XXXXX

XXX is an organization specialised in

You currently have X employees

You are located....

Your goals and challenges

You want to offer...

The process we discussed is today an activity that is taking X hours and estimated RX/month

Our opportunity

At our meeting, we discussed a potentially beneficial collaboration

Key benefits for you are:

Less risks in doing advance

Provide a digital solution

Provide tools to....

Our next steps

1. Please edit / comment in this discussion document to ensure that I've captured our conversation accurately
2. Here is the presentation we shared that introduces our firm
3. You will set up a call with the HR department and you would like the CEO to also have a look at the solution.
4. We aim at meeting again in the next 7 days.