Accounts Payable and Expense Automation Built Natively on the Salesforce Platform

● Pitch Deck

Marketplace Condition

Issue
Sales and Marketing Teams need a tool to focus on the Cost of Customer Acquisition

Problem
Sales and Marketing teams have trouble consolidating their efforts and are often pitted against one another, proving their worth

Sales and Marketing executives need a tool to bring them together and consolidate their efforts around Customer Acquisition costs

Solution

Sales and Marketing teams continuously use Salesforce to drive their daily activity

ExpandAP has developed the industry's first Salesforce native application targeting CMOs and CSOs to help them understand

The effectiveness of their campaigns and sales cycles,

The cost of Customer Acquisition

Step one is the **Collaboration of Sales and Marketing.** Next, we will focus on Customer Profitability.

This is the first solution of its kind in a native Salesforce Application

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Problem

4 in 5

Professional Services and SaaS companies have these issues, especially those implementing Professional Services Automation (PSA) on the Salesforce platform.

Also Non-Profits and others from Coalescence.

High Cost of Errors

Companies with misaligned sales and marketing functions experience an average annual revenue decline of 10%.

Complex Approval Processes

Inefficient approval workflows cause delays and bottlenecks in invoice processing.

Lack of Integration

Salesforce, despite being a leading CRM/ERP platform, lacks an expense management offering.

Who Are We?

ExpandAP is an **Expense Management, Accounts Payable and ROI Solution** that is built natively on the Salesforce platform.

Our Mission

Empower marketing and sales teams with data-driven insights to **prove ROI and optimize budgets**.

Unite finance, operations, sales and marketing teams in one platform, empowering businesses to make decisions with full financial clarity.

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Team Intro

Paul Wnek
Founder & CEO

An experienced leader in the industry!

A passionate cloud computing entrepreneur, Salesforce expert, and certified consultant.

As the founder and **CEO of Coalescence Cloud**, he has achieved remarkable milestones:

- Bootstrapped to **$6M in annual revenue**
- **Over 50 clients** across the globe in less than four years

Flo Boymond
Chief Revenue Officer

7 years at Salesforce

- **Business Development** - Created **$15MM** in pipeline
- Generated **$100MM** in new Salesforce **ARR in a single year**

5 years of experience working with partners

- **Opened Odaseva's (ISV) office** - Built sales teams and grew the company **from $2M to $20M in ARR within 4 year**
- Consulted as a fractional CRO

Lance Foster
Vice President – Partnership and Alliances

25+ years of experience in enterprise software and services

17+ years in the Salesforce ecosystem

- **Built and scaled global partner alliances** (including SI, SaaS/Technology, and OEM/ISV Resellers).
- **Specializes in building partnerships** with Salesforce and other SaaS and IT consultancies.

John H Capobianco
Chief Operating Officer

30+ years of experience in enterprise software and services

- **Built and scaled global software businesses,** including Computer Associates, SAP, Bluestone, MEDecision, VITAC, etc.
- World Class Operations, Sales and Marketing Executive

Bringing the Solution to Market

What Do We Have?

A solution that **bridges the gap between spend data and CRM data** like campaigns, accounts and opportunities, uncovering new insights

Features that Span Customer Maturity Levels

Expense Management

Native to Salesforce.

Corporate credit card solution.

Spend and Revenue Reporting

Expense roll-up at the account, opportunity, and campaign level.

Real-time visibility into marketing and sales spend and budget.

Forecasting and Modeling

Financial modeling tied to customer acquisition expenditure returns.

Financial forecasting based on past returns and current expenditures alongside CRM activities.

[CONFIDENTIAL: Coming soon - Profitability Intelligence Platform]

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Who Wants It?

Primary Buyers
CMOs, CSOs/CROs

Industries
$20M-$80M B2B Sales Organizations

$10M-$50M for early sales	**Identify** those exact industries and key accounts	**Segment** by industry type to develop ICP

Pain Points Addressed

Lack of alignment between marketing, sales and finance

Difficulty justifying marketing budgets

Fragmented data across systems

Inefficiencies in reporting and analysis

Lack of visibility into marketing and sales ROI

Inability to accurately forecast results or model budgets

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Why Do They Want It?

Enables CMOs/CROs/CSOs and sales teams to **defend their budgets and demonstrate measurable ROI.**

Provides expense transparency, allowing GTM teams to be transparent in real-time and in control of their budget and spending.

Grows with an organization, from tactical expense management to transformational profitability intelligence.
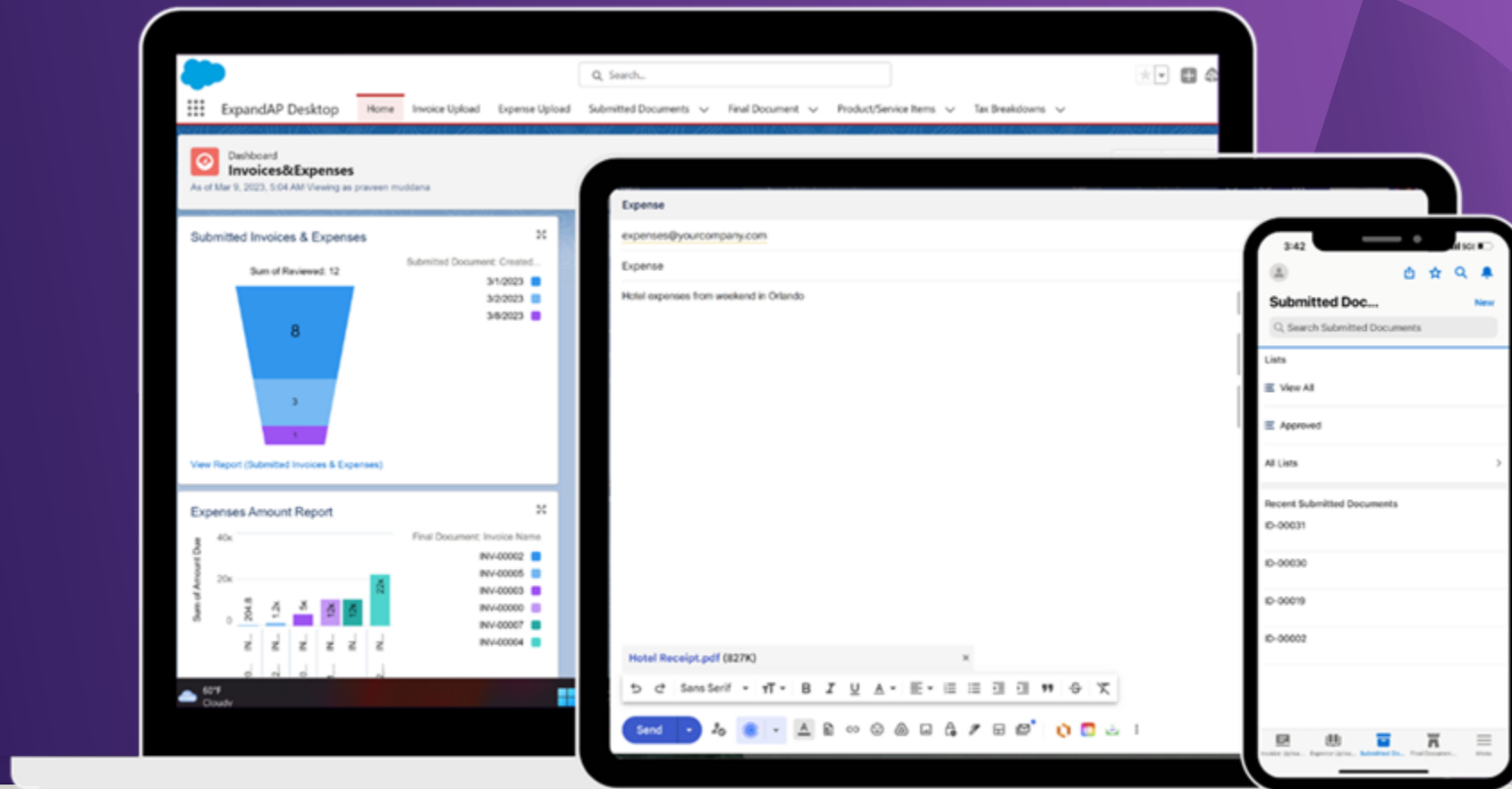
Key Buyers & Stakeholders

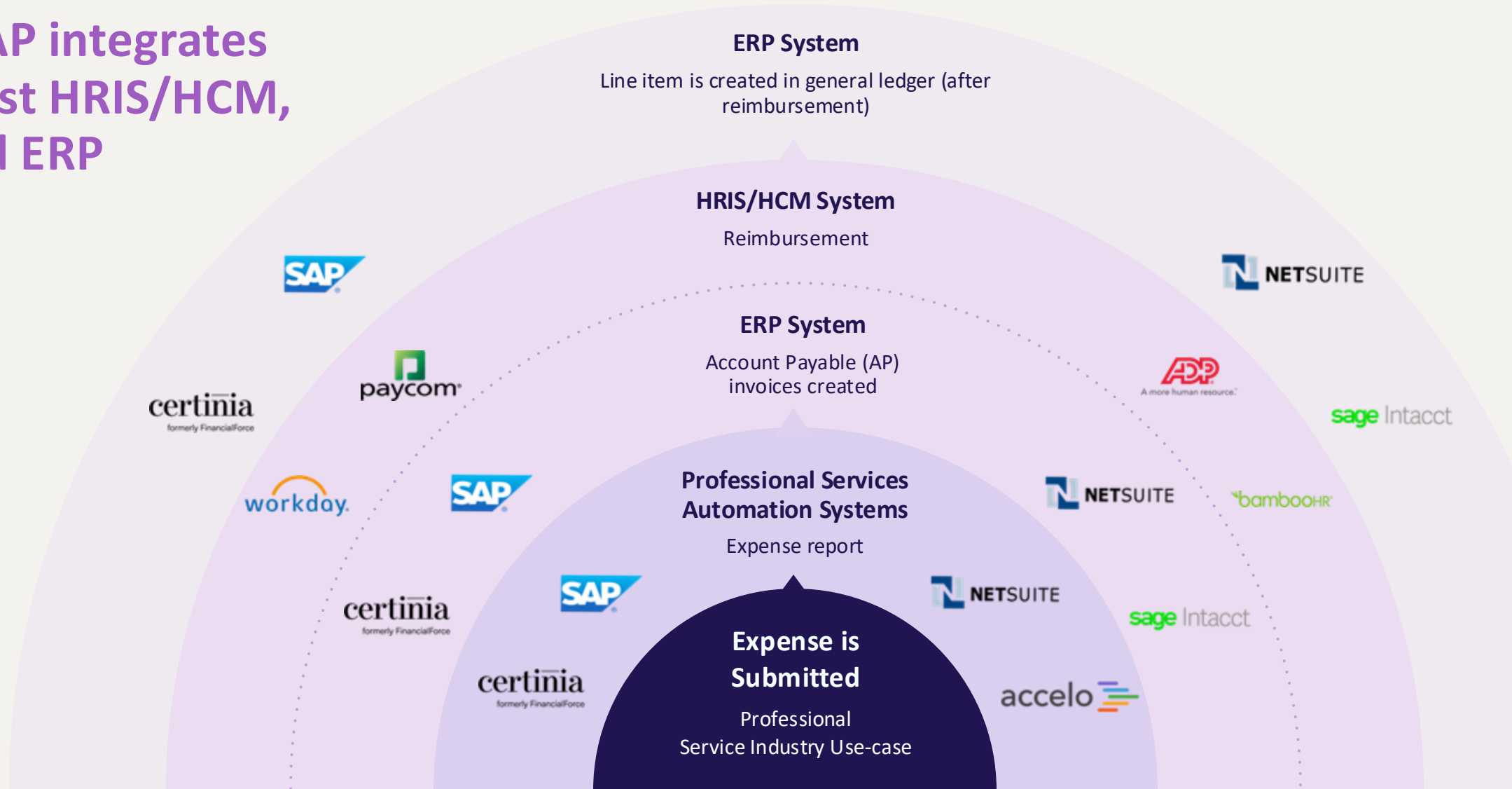|		
Ultimate Economic Buyer: COO	Internal Champion/Beneficiary: CMO/CRO/CSO	Naysayer: IT or Finance Teams

The Three Stages of Spend Efficiency

Maturity Levels

Profitability Intelligence

Spend x Revenue Reporting

Expense Management

Business Value

Transformative

Tactical

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Meeting sales and executive teams where they already operate

Integrations

ExpandAP integrates with most HRIS/HCM, PSA, and ERP systems

ERP System

Line item is created in general ledger (after reimbursement)

HRIS/HCM System

Reimbursement

ERP System

Account Payable (AP) invoices created

Professional Services Automation Systems

Expense report

Expense is Submitted

Professional Service Industry Use-case

Market Size and Opportunities

**150,000+ companies** use Salesforce, which translates to an estimated,

164 Million Employees

The Salesforce Partner Ecosystem is currently 5x the size of Salesforce itself, **expected to reach 6x by 2026**

SAP Concur

SAP is a **pioneer in the Expense and AP Management space**, holding a **43.95% Market Share**

As a Salesforce competitor, SAP has only 4.7% of the Global Market Share, compared to Salesforce's 22.9%.

4.7%

SAP Global Market Share

Salesforce Global Market Share

22.9%
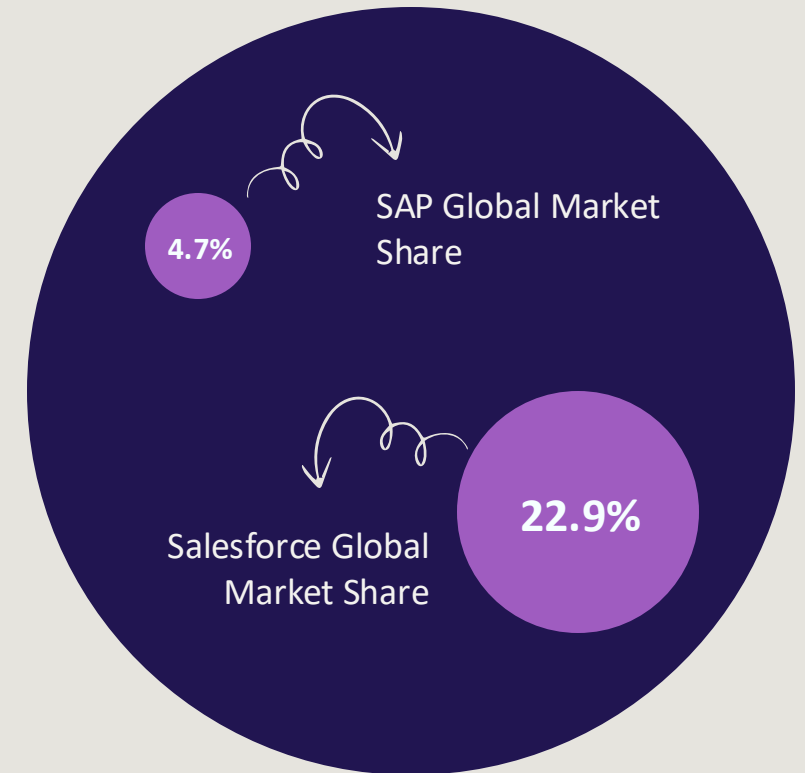
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SAP Concur - Primary Competitor

#1 Pioneer in the Expense and AP Management space, holding approximately 43.95% market share.

5.16 %

emburse chromeriver

9.13%
Expensify

43.95%
SAP Concur

20.63%
coupa
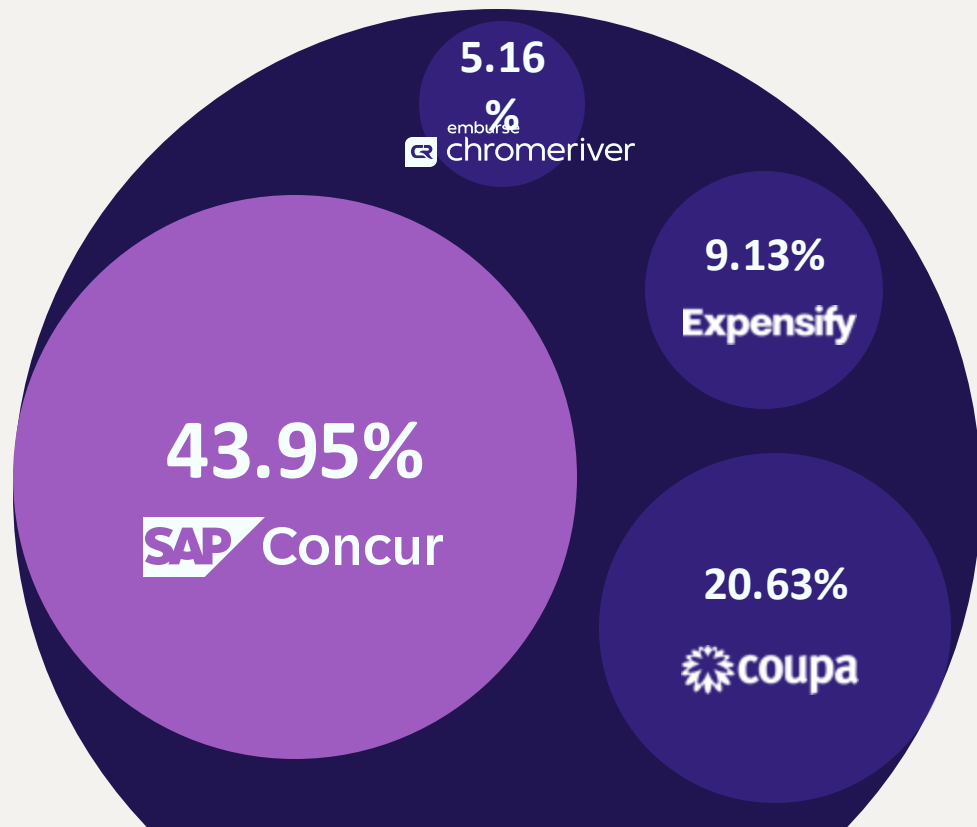
ExpandAP has a similar opportunity to Concur's adoption depth

It's implemented as a Company-Wide solution

V/s

Solutions like

Brex   Expensify   Airtable   ramp

Which **can be activated on an individual and team level** and not implemented for the organization at a whole

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Expensify

It's the best guide as it's a pure Expense Management Technology company that's publicly traded, whereas, SAP doesn't necessarily breakout numbers for concur when reporting to shareholders

#3
Leading company in the Expense and AP Automation market, holding approximately 9-10% market share.

$175M
Annual revenue of 2022

Billion-user*
ambition in the market

*According to their investor presentation

750k paid members
as of 2022 represent less than 1% of their ambitious goal

706K
Past Members

$40.4M
Revenue

36%
Y/Y Revenue Growth

$161.6M
Annualized Revenue

Three Secrets to Expensify's Long-term Success

Enormous untapped market opportunity

Unique bottom-up acquisition model
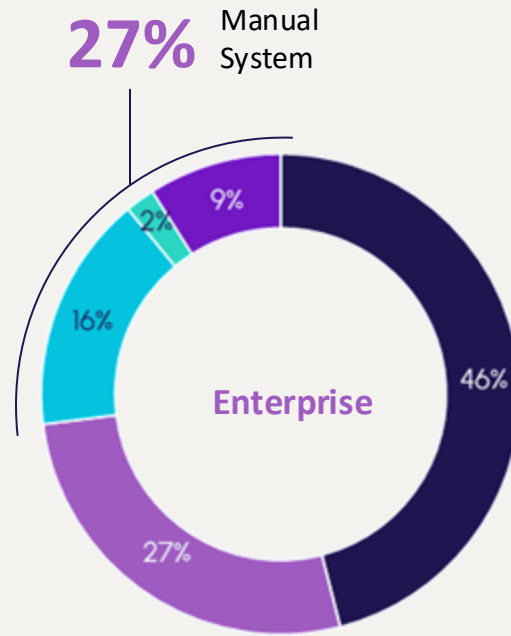
Billions user platform ambition

Expensify believes to have captured less than 1% of the "**billion user**" market opportunity.
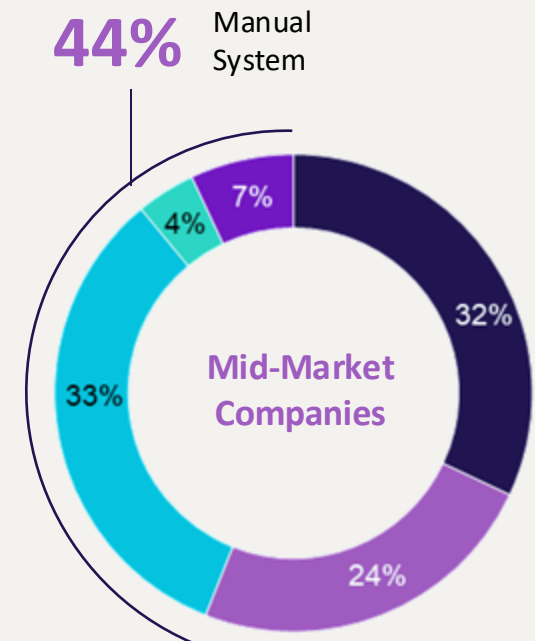
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Market Size and Opportunities

Manual Processes

1/3

companies use combination of manual processes i.e. paper or spreadsheet for expense management.

27% Manual System

9%
2%
16%
46%
27%

Enterprise

44% Manual System

7%
4%
33%
32%
24%

Mid-Market Companies

● Dedicated solution

● ERP/ accounting package (Oracle, SAP etc.)

● Microsoft Excel/spreadsheets

● Pen and Paper

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Expense and AP Management: Addressing a Critical Gap

69%

of US companies report that **Sales and Executive teams account for** the majority of their **expenses.**
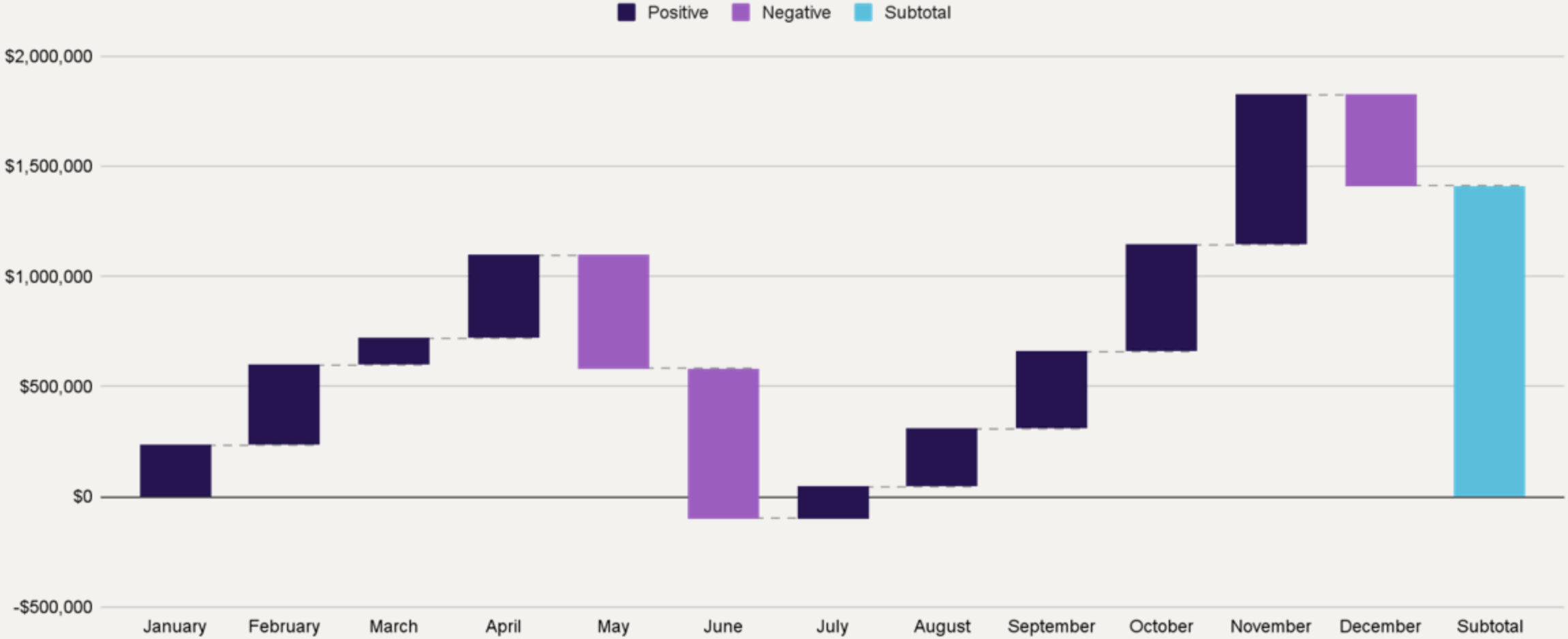
90%

of Fortune 500 companies use **Salesforce as their CRM** for their sales teams.

salesforce

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Funding Growth

Use of Funds

Fundraise Ask

$2M

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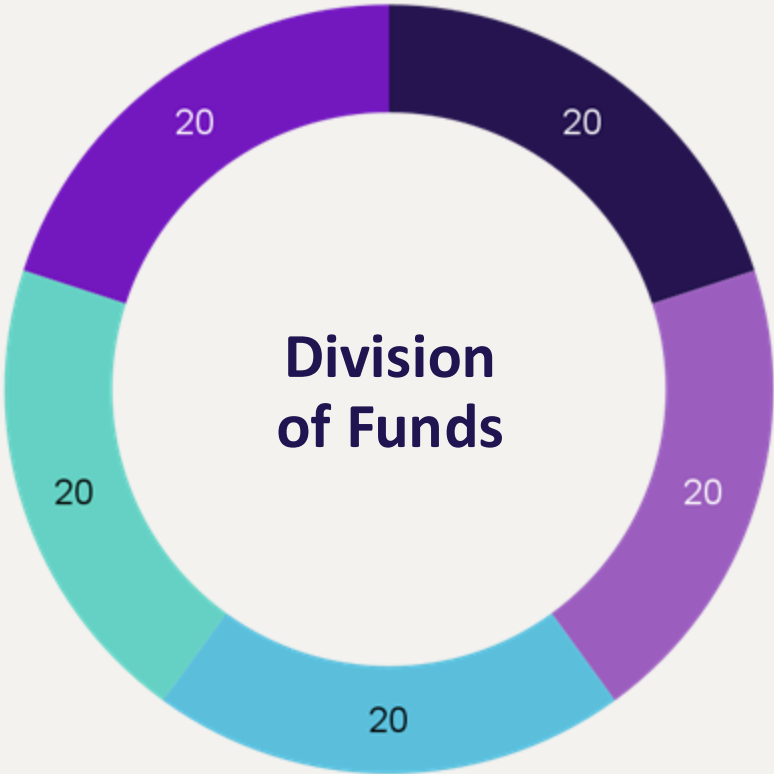
Goals with raise:

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Division of Funds

20
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