

Giving  
you the  
competitive  
edge

in  
Financial  
Services

# Helping teams win for over 35 years

Thought-provoking and compelling proposals are key to securing and retaining client business.

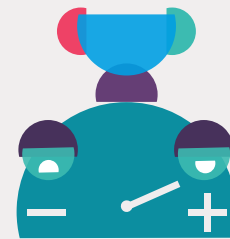
As the UK's leading proposal specialists, we've used our tried-and-tested methods, tools and processes to help financial services organisations win major deals. So, why work with Strategic Proposals?



We bring you an in-depth understanding of complex buyer processes and techniques.



We have exceptional experience in winning bids, proposals and pitches for our customers.



We're experts at collaborating and improving efficiency to lighten the load on complex bid and proposal projects.



## Winning is in our team's DNA.

We're a close-knit team who are always ready to work with you – whatever the assignment requires.

We bring a team of experts in campaigns, bids, proposals and presentations. It's not only our people's talent, skills and expertise that makes us so sought after. It's the unrivalled experience we bring, along with our positive and friendly approach.

We share best practices actively across our teams, continually pushing and helping one another to reach even higher standards.



# What we do:



Win bids



Train to win



APMP certification



Capability improvements

# Key issues in your sector and how we can help

## Challenge

Intense competition

Making complex  
technical solutions  
clear and precise

Building trust, and  
demonstrating  
experience

Pricing and cost  
competitiveness

Meeting diverse  
client requirements

Stringent regulatory  
requirements

Adopting AI

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# Solution



## **Proposal strategy and positioning:**

In this highly competitive industry, you must understand your competitors' offer, and their relationships with the customer and third-party stakeholders.



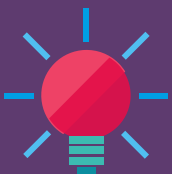
## **Simplified and persuasive communication:**

Being clear and concise – complex solutions, market jargon and regulatory buzz words can make propositions inaccessible.



## **Case studies and client testimonials:**

Providing evidence that you've successfully delivered similar solutions before is crucial in highlighting your track record and expertise.



## **Competitive and clear pricing strategies, value propositions and value engineering:**

We'll help you develop competitive, value-for-money pricing strategies that align with client budgets and requirements, while maintaining profitability.



## **Industry sector know-how and skills:**

Our experience will help you understand and address the broad range of customers' needs and preferences - fundamental to success.



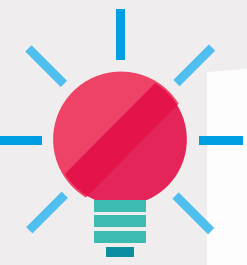
## **Expertise in compliance - check and check again!:**

Ensuring you clearly show how your service adheres to the stringent and ever-evolving regulatory requirements.



## **Changing ways of working:**

Understanding the right use cases and tools to adopt and how to refresh your ways of working to safely benefit from using AI.



# Success stories



UK insurance company

**£4m contract secured with high street bank**

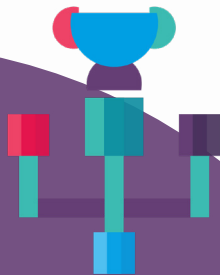


Major insurance company

**£150m asset value secured via competitive bid**

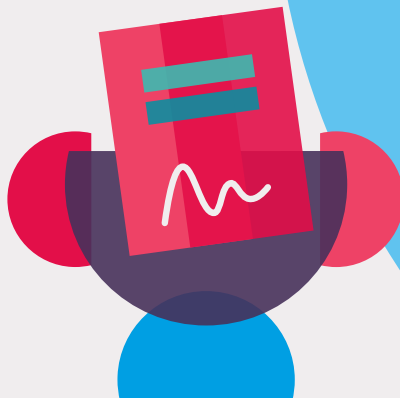
Major insurance company

**Dislodged 20-year incumbent to secure biggest global contract of this type**



Major commercial insurer

**£2.3m framework win**



Proactive proposal

**£370m contract secured**



L&D programme for outsourcing business

**Win rate improvement from 47% to 68%**

Benchmarking for global bank



**32 areas for win-rate improvement identified**



Transformative change through interim management

**Doubling of win rate and halved cost of sale**



Trusted adviser to large pensions company

**300% increase in value of wins**



# An award-winning team, with over 35 years' experience

Helped clients **win billions** with a capture rate of over **90%**



Over **15** years as an APMP Accredited Training Organisation  
Association of Proposal Management Professionals

Over **35** years serving clients globally



Working across all major industries including both the public and private sectors



More than **40** highly experienced professionals



Proven processes and tools



Try our free-to-use tools:

