
A New Blueprint for Growth

Supercharging Win Rates, Margins and
Retention Rates
with
Advanced Client Targeting (ACT)

ACT Sales Expert

5-minute listen

ACT Demo



📅 YY MMM 2025

🕒 15-Minute Presentation

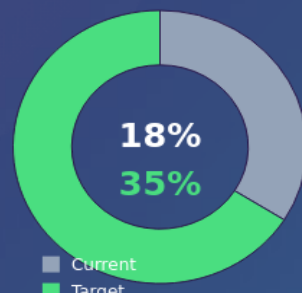
🎥 15-Minute Demonstration

POWERED BY



Here Are Your Targets: From Incremental to Exponential Growth

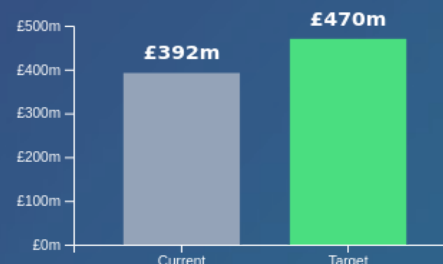
Current vs. Target Win Rate



Double the win rate from **18%** to **35%**

Focusing on pre-qualified, high-propensity opportunities

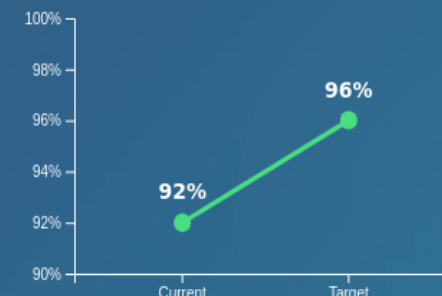
Annual Inflows from Increased Win Rate and Margin



An uplift of **£78m** in new inflows

Generating an additional £6.2m in pre-tax profit annually

Projected Client Retention Rate



From **92%** to **96%**

Proactively identifying and addressing 'at-risk' client triggers

Overall Return on Investment Summary: **Tangible benefits could yield £7 million to £23 million plus in annual value**, making the £200k investment recoverable in 1 to 3 months while providing a competitive edge.



Increased Win Rates (10% to 20%): Applied to £392 million new business contribution, this could generate £39 million to £78 million additional inflows. At the 5% to 8% pre-tax margin, that is £2.0 million to £6.2 million extra profit — 10 to 31 times return on investment.



Shortened Sales Cycle (50%): Halving cycles frees up sales resources equivalent to 0.5 to 1 full-time senior sales or marketing person per team, saving £50k to £150k in opportunity costs per team while accelerating revenue recognition.



Margin Improvement (5% to 10% on Non-Tender Wins): Assuming 50% of new business (£196 million) is non-tender, a 5% to 10% margin boost adds £4.9 million to £15.7 million in profit (applying to base 5% to 8% margin) — 24.5 to 78.5 times return on investment.



Avoided Low-Win Tenders (1 to 2 per year) and Data License Savings: Tender avoidance saves £100k to £1 million annually (bid preparation costs, based on industry norms); replacing inferior data sources could save £50k to £200k per year. Combined, these offset 75% to 100% of the ACT system's ongoing £150k fee from Year 2.

These are not incremental targets, but ambitious yet achievable goals that transform market position

How ACT Spots 'Clients-in-Waiting'

Using Big Data and AI to Pre-empt the Drivers of Buying Behaviour



Companies House

Company Website

Scheme Website

The Pensions Regulator

31 News Sources

Competitor Websites

LinkedIn/X

Corporate Triggers

- A new CFO is appointed
- Post-M&A benefit harmonisation
- Trading updates sliding south

Scheme Triggers

- New chair of trustee or impending retirement
- Persistent investment underperformance
- Covenant strength falling
- DB scheme funding level improves

Governance Triggers

- New legislation
- Chair's Statement reveals dissatisfaction or increased use of training
- Scheme fails Value for Money assessment

People Triggers

- Key executive leaves
- Key competitor service lead leaves or is due to retire
- Executive changes in HR or finance department

85%

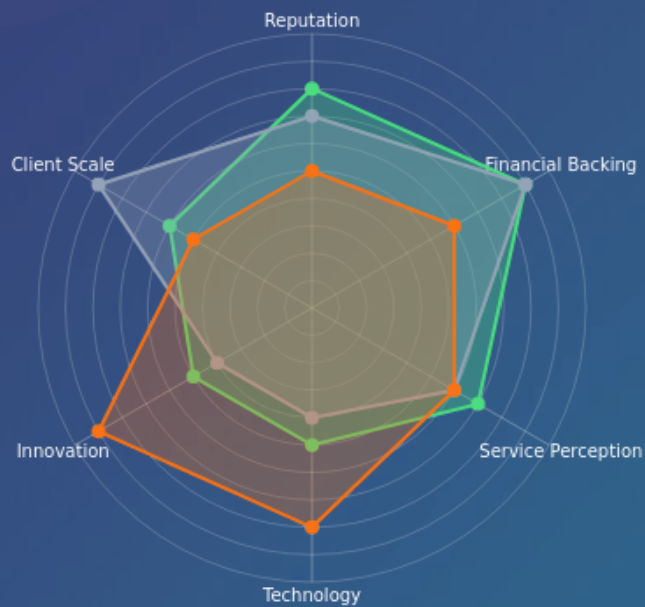
Probability of a scheme review within 18 months when a new CFO, recent acquisition, and investment performance dip are present

ACT identifies these 'clients-in-waiting' before they're ready to buy, allowing clients to shape their solution rather than competing on price

Comparative Analysis: Reshaping Perceptions

How the market perceives you today versus our key competitors—the established giants and the tech-driven challengers.

Competitive Positioning Radar Chart



ACT changes this narrative. It repositions you as a go-to partner, moving the conversation from 'How much do you cost?' to 'How did you know we had this problem?'

Dimensional Analysis

Dimension	XYZ	ABC	EFG
Reputation	Very High (Heritage)	High (Market Leader)	Moderate (New Entrant)
Financial Backing	Very High (Phoenix)	Very High	Moderate (VC-backed)
Service Perception	Good to Very Good	Good (Scale-driven)	Good (Tech-enabled)
Technology	Evolving	Legacy at Scale	Leading-Edge (USP)
Innovation	Moderate	Low to Moderate	Very High
Typical Client Size	Mid to Large Corp	Large Corp	SME to Mid-Corp
Pricing Perception	Premium	Competitive at Scale	Low Cost

The Opportunity: A Compelling and Rapid Return

A Strategic Investment, Not a Cost

The Investment

First-Year Cost: **£200,000**

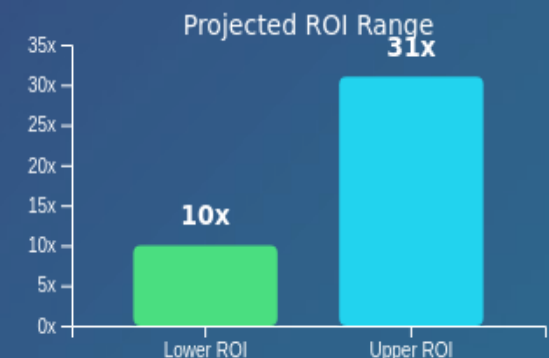
Setup +
Licence: £50k + £150k

As % of
Revenue: **0.023%**

Comparable to: 1.5 Senior Sales Hires

Negligible investment compared to the value
it delivers

The ROI



Payback Period: **< 3 Months**

Annual Value: **£7m - £23m**

Projected ROI: **10x - 31x**

The Strategic Imperative

- ✓ **Win Before the Tender**
Move "upstream" to shape deals and avoid margin-eroding competition
- ✓ **First-Mover Advantage**
Secure a 3-year exclusivity option to lock out your top 5 competitors
- ✓ **Empower People**
Equip sales teams with intelligence that makes them indispensable partners to clients

Recommendation: Implement ACT as a core strategic priority to secure our market leadership

The choice is clear. The future is intelligent.