



## Proposal Manager: Proposal Management for Commercial Lending

Commercial banks today are focused on digitizing back-end processes to keep pace in an increasingly competitive environment. By digitizing the credit origination process, banks improve the customer experience, speed processes, increase productivity, and reduce operational costs.

The Proposal Manager Solution enables commercial banks to streamline and automate the commercial proposal process, create more effective proposals and better collaborate across the enterprise, taking advantage of the familiar connected and intelligence experience in Microsoft 365. The solution helps banks remove silos to transform proposal development into an agile, collaborative, secure and client-centered process.

“With intense competition increasingly levelling the corporate banking playing field at a product level, banks have an opportunity to differentiate based on customer experience.”

*[Connected Corporate Banking: Breaking Down the Silos](#)*. Celent. 2018.



## **The Microsoft Proposal Manager**

solution helps enable repeatable, secure digital processes to automate highly manual and labor intensive commercial lending interactions, resulting in increased collaboration, improved document management, and ultimately, a better client experience.

### **Integrated for simplicity**

Integrate data from existing core systems and documents while automating proposal management. Streamline the commercial loan proposal process with integrated, automated and secure tools for opportunity management, credit committee collaboration and document management. Create and manage proposal workflows in a secure and compliant manner, track proposal progress with built-in tracking and notifications, and dynamically generate proposals whether at work or on the go.

### **Built for teamwork**

Enable seamless cross-team collaboration with connected communications and document editing capabilities. Respond to proposals quickly and collaboratively with company-wide communications and collaboration tools. Meet tight deadlines and keep the proposal process moving seamlessly by sharing and collaborating in real-time.

### **Unlocks winning proposals**

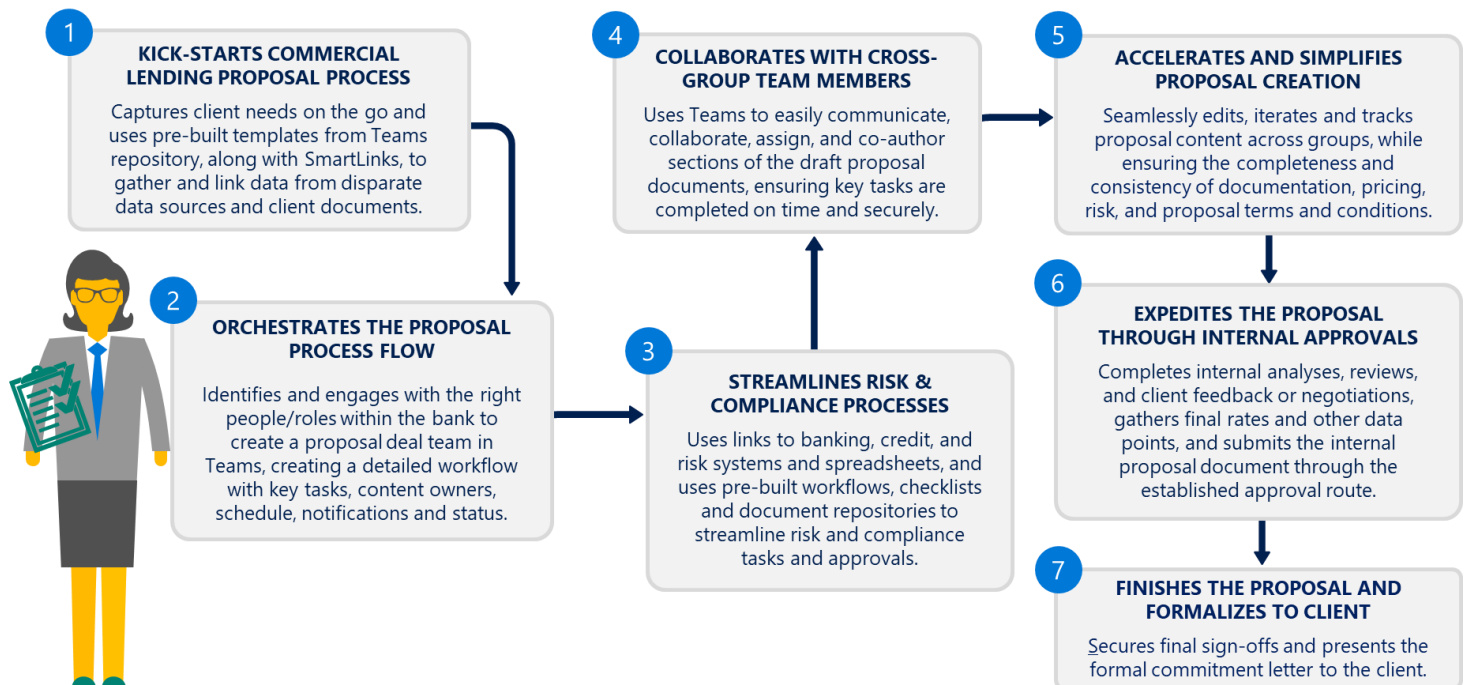
Microsoft 365 helps you save time, sharpen your ideas, and present professional proposals, leading to higher win rates. Deliver personalized and professional proposals quickly and easily. Bring proposal presentation slides together rapidly with intelligent design support, so you spend less time on formatting. Communicate your ideas clearly with a built-in digital writing coach, then illustrate your proposal using a new set of modern charts that simplify complex information.



# Solution overview

## Proposal Manager: Proposal Management for Commercial Lending

**Scenario:** A relationship manager and loan officer collaborate with a deal team to prepare a **commercial lending proposal** for a prospective client. Below are the steps the solution streamlines for them.



# Why Microsoft

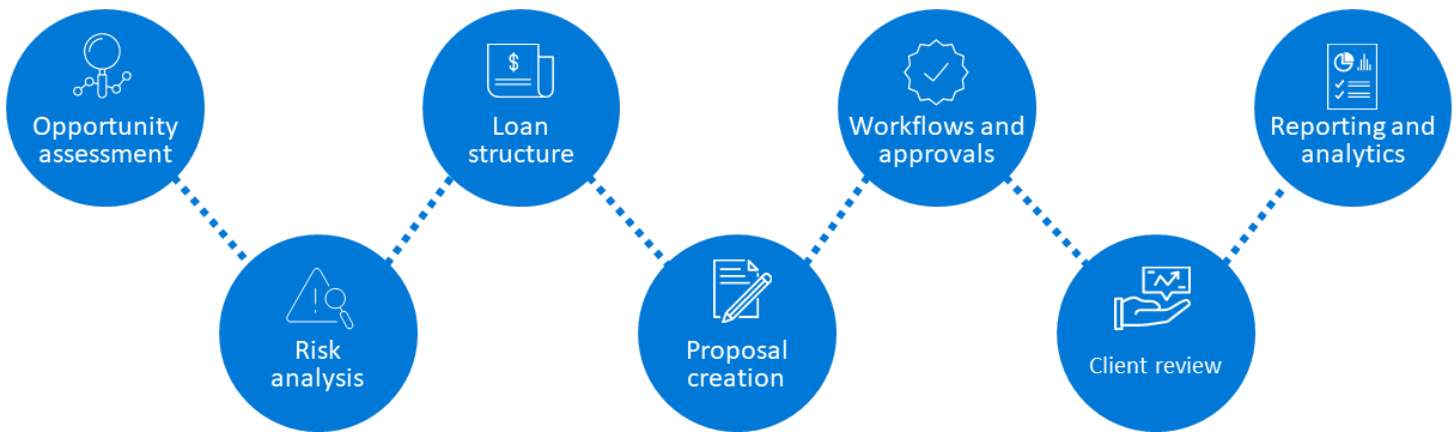
Microsoft is empowering banks with a complete proposal management solution built from the ground up and backed by decades of relevant industry experience. The Microsoft Proposal Manager solution also incurs no incremental cost, utilizing capabilities already available within your Office 365 licenses, preventing the need for IT implementation support. Take advantage of one of the few solutions built on top of the Microsoft 365 productivity suite and addressing a particular business pain point – streamlining the loan origination process.

**Industry Experience and Partner Network** 80% of global systemically important financial institutions have adopted Microsoft's cloud, demonstrating deep industry knowledge. Combined with a rich partner ecosystem, Microsoft has the depth and breadth of understanding necessary to deliver a unified banking experience.

**Analytics and AI** Microsoft offers flexible AI and analytics services to address any scenario, from bots to natural language processing. Our AI infrastructure has virtually limitless scale and comprehensive tooling for AI coding and management.

## Streamline and unify disjointed processes with a comprehensive proposal management platform.

Experience benefits such as reduced time-to-market, seamless management of disparate documents (both internal and external) and mobility for relationships managers and other deal team members.



Learn more  
[microsoft.com/banking](https://microsoft.com/banking)

