



THE QVIDIAN EDGE: SUCCESS DECODED

**Go from
static content
process to
full proposal
automation.**

FINANCIAL SERVICES | TRANSFORMATION STORY



INDUSTRY

Financial services and asset management

COMPANY

Retail RFP and business response group

ESSENTIAL SALES DOCS

Requests for proposals (RFPs)
Due diligence questionnaires (DDQs)
Separately managed account questionnaires

This large financial services and asset management organization has a multi-boutique structure. Their Retail RFP & Business Response group is responsible for many tasks including managing mutual fund and SMA questionnaires, recurring client reporting, new business RFPs and responding to due-diligence questionnaires. They needed a solution that took full advantage of Qvidian's library to store and automate content.

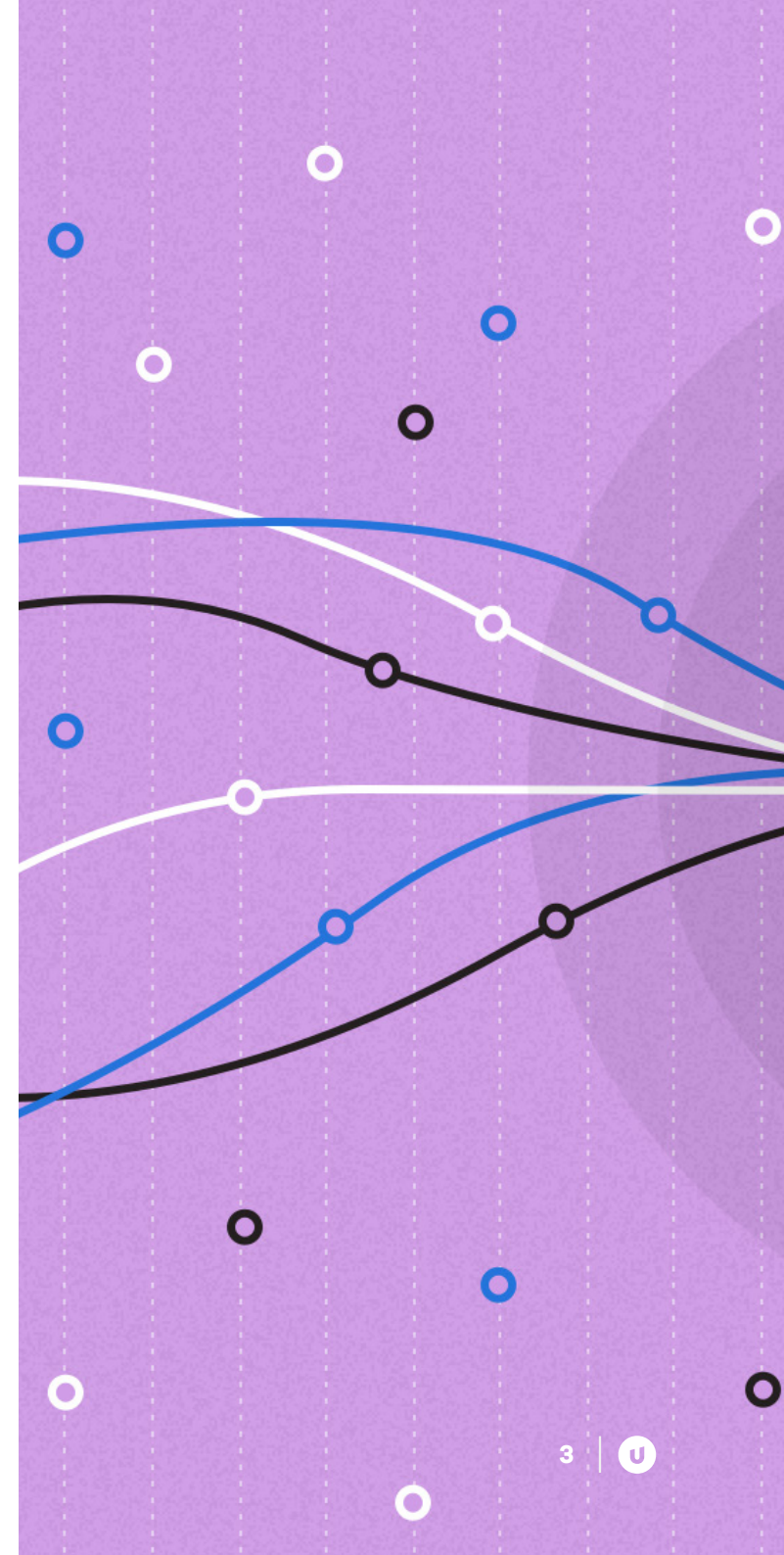


How can Qvidian turn a static content repository into a full proposal automation platform?

This organization's library and strategy had gone completely static, leading to frustration and low user adoption

This group of Retail RFP and Business Response professionals was suffering under a static content library and manual process. While they had Qvidian, they were using it primarily as a static source of truth for all of their proposal content. By not taking advantage of Qvidian's automation features, role permissions, and real-time analytics, they were saddling themselves with hours of manual effort searching through out-of-date and under-used content.

This group wanted to take full advantage of everything Qvidian had to offer to speed up their RFP responses, automatically answer critical questionnaires, and make their work more rewarding.



With help from Qvidian's team of experts, this company transformation is in sight and meaningful work is here to stay.

What they needed: structure, sustainability, and a modern approach to RFPs

Our team of industry experts at Qvidian understood just what this group needed. They already had the framework of a successful operation, all they needed was some extra support to turn their vision into a reality.

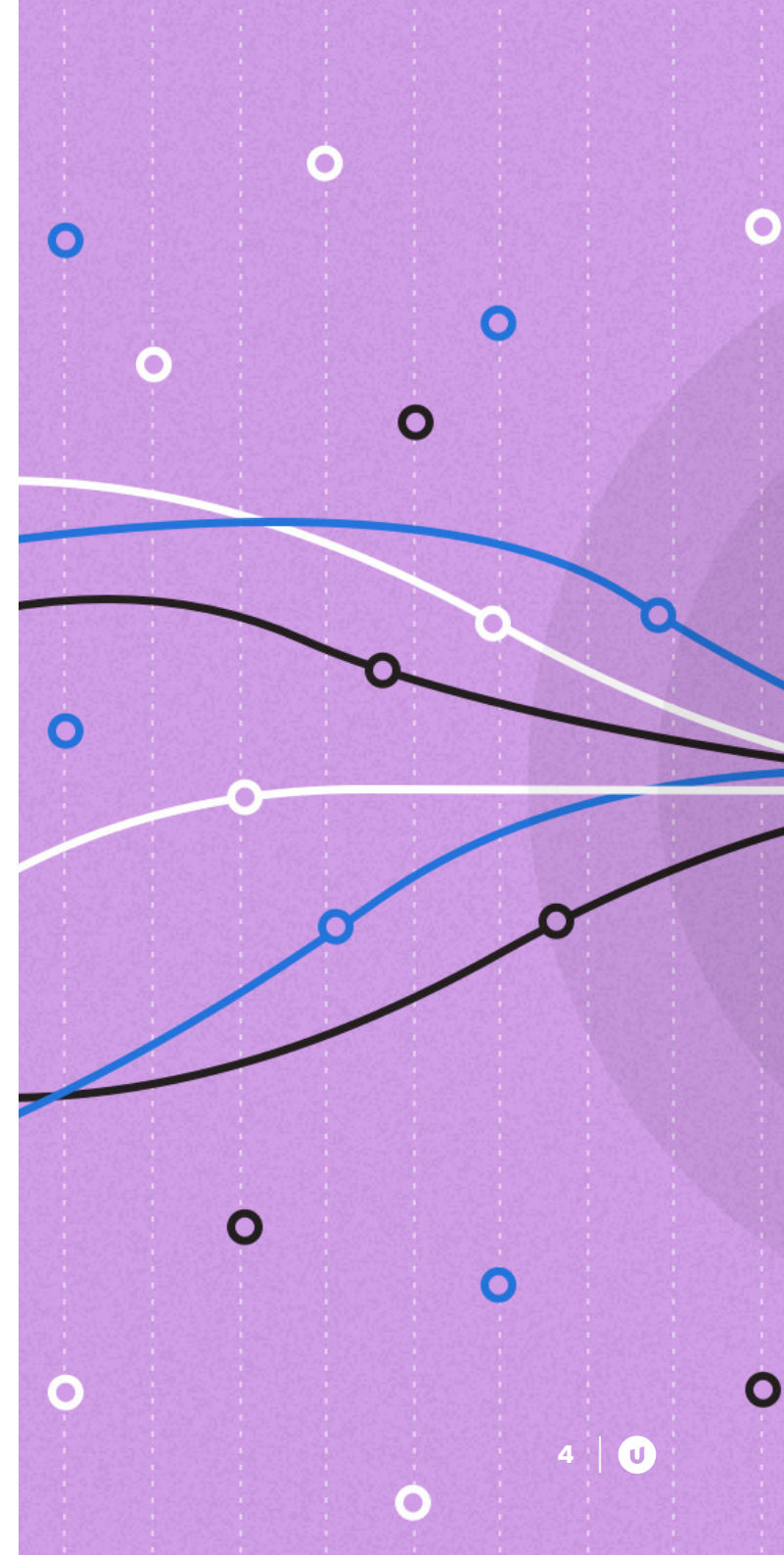
We focused on five core areas of improvement:

1. Producing a clean, accurate, and trusted content library
2. Getting the group to adopt Qvidian Projects
3. Establishing a repeatable content governance model
4. Improving efficiency on recurring deliverables
5. Providing better visibility and usage analytics

Everyone involved rolled up their sleeves and got to work. Our Customer Success and Professional Services team partnered with their RFP group to rebuild their Qvidian foundation, introduce automation, and set them up for a complete transformation.

First up: content cleanup

After a full library assessment, we were able to identify 9,000+ archived records, a high volume of unused or duplicate content, and plenty of outdated materials. Only 149 records had been modified in the last year, with most content being 3-10 years old. We guided the team through a structured content cleanup approach, deleting or archiving year-old content, exporting and reviewing items, rebuilding folder structures, and applying consistent styles and templates to everything.



Next up: say hello to automation via Qvidian Projects

Qvidian Projects is the heart of the Qvidian projects giving teams a more structured and automatic way of handling sales documents. Working with our Technical Support and Professional Services team this group began piloting Projects for their recurring deliverables.

We established a process of uploading client questionnaires and using Qvidian to automatically scan and auto-slice identified questions. From there we unleashed Qvidian Search Mode to automatically surface insert approved answers. As new content needs arose, we took a structured approach to both submitting new and updating old content and established an automatic workflow for assigning SMEs to review content directly in Qvidian.

The results were crystal-clear: content maintenance shifted from a one-person burden to a shared workflow and answering questions took seconds, not hours.

Let's set some user roles

Our team understood that, in large organizations, roles and permissions are critical. With their help we restructured permissions, establishing power users best fit for Admin roles and contributor roles for everyone else. Additionally, we came up with clear separation of duties while still providing the ability to manage review jobs, metadata, and templates.

This redesign clarified everyone's place in the process while streamlining work and improving future content performance.

The final touch: training, onboarding, and support

Let's be honest: a new process only works if people know how to use it. Our Customer Success Manager and Professional Services Consultant understood this and leaped into action, devising a custom hands-on training program for the group. During this training they focused on demonstrating Project workflows, coaching the group on content governance roles, and facilitating monthly success checkpoints as well as options for rapid support escalation.

True transformation, thanks to Qvidian

With Qvidian, this group is now positioned to automate their monthly and quarterly reporting, collaborate efficiently across teams, scale their operations, and keep their content library accurate and up to date. With some elbow grease and a little training, they're now positioned for a true transformation with increased user engagement, reduced manual work, and a renewed confidence in their day-to-day work.

Results for this company

- Increased user engagement
- Clear path to a modernized library – a plan to reduce 12,000 records
- Reduced manual work
- Faster content updates
- Better alignment with enterprise standards
- Renewed confidence in the platform

From proactive proposals and presentations to complex RFPs, DDQs, and SOWs, Qvidian gives teams the structure, automation, and visibility they need to make work meaningful. With an unmatched nearly 50 years of experience our customers trust in Qvidian to support their full range of content, drive revenue, and build trust.

