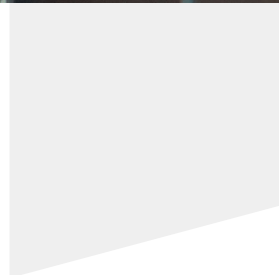




THE QVIDIAN EDGE: SUCCESS DECODED

**A global
investment
management firm
needs a secure,
compliant, and
fast proposal
process.**

FINANCE | TRANSFORMATION STORY



INDUSTRY

Finance

COMPANY

Global investment management firm

ESSENTIAL SALES DOCS

Requests for information (RFIs)
Requests for proposals (RFPs)
Due diligence questionnaires
(DDQs)
Proposals

This global investment management firm operating across North America, Europe, and Asia has a lean business development team charged with supporting a high volume of RFPs, RFIs, and DDQs. As the complexity and volume of requests increase, they needed a modern and auditable solution to eliminate manual processes and win more business.

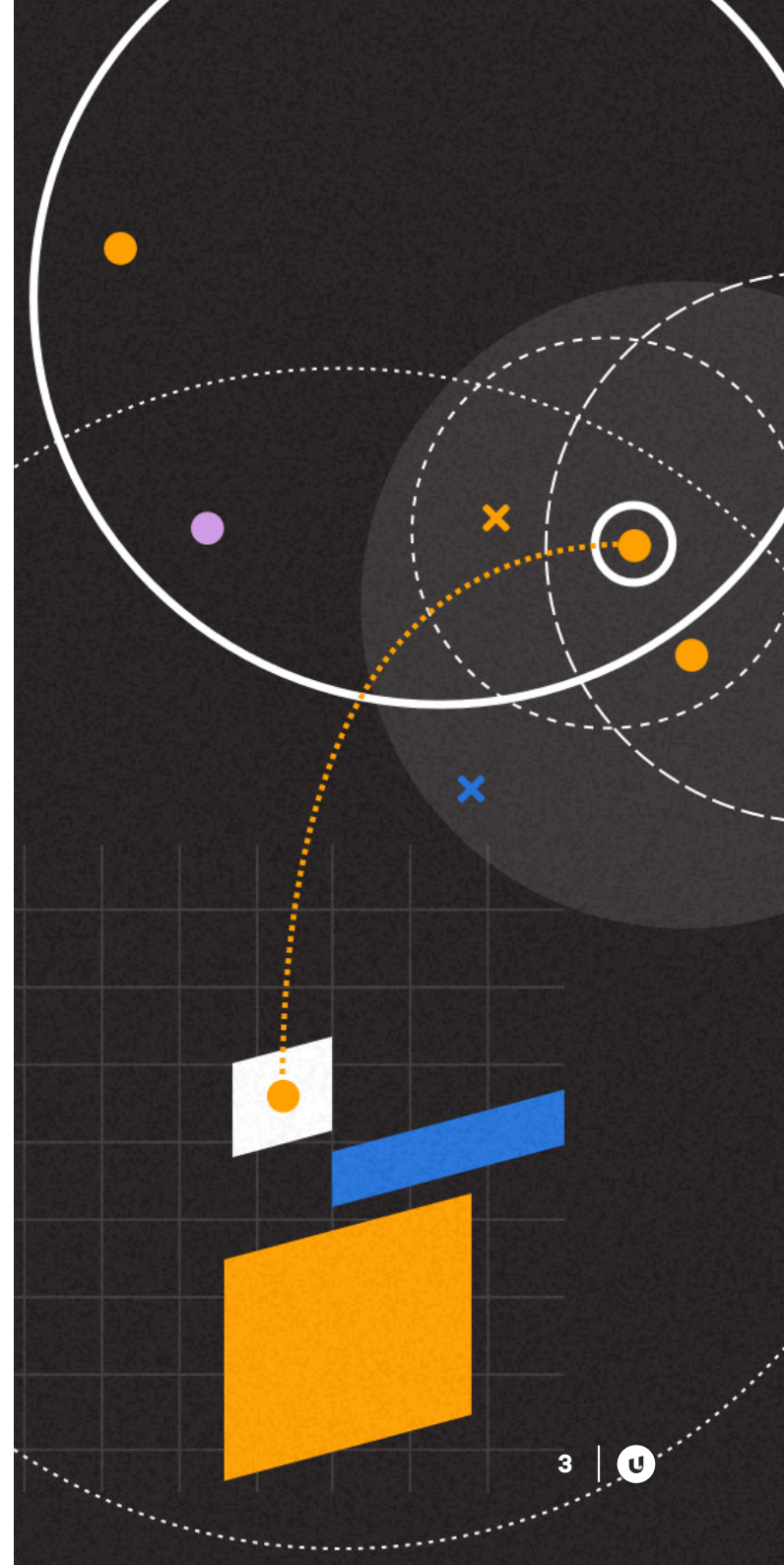


How to build a modern proposal process that tackles complex and high-volume requests while keeping data secure and compliant?

This investment management firm faced several common challenges for their industry. Processes and content were fragmented and highly manual; compliance requirements were adding burdensome roadblocks, and worst of all: the requests were increasing and getting more complicated.

Our customer needed a platform that could handle the strict data-privacy requirements necessitated by their industry while speeding up their overall delivery time. They needed a secure content library, easy-to-use automation, a streamlined approach to collaborating with Subject Matter Experts (SMEs), and a way of ensuring all content is accurate, tracked, and compliant.

Additionally, during this firm's prior experimentation with consumer AI tools, they found inconsistent outputs with little to no connection to approved content. Worst of all, while they found generative AI promising, their past experiments also raised serious data-privacy concerns.



Qvidian provides the complete package: security, automation, content clarity, and AI that works.

Leveraging Qvidian's content library made securing and finding content easier

To start, we focused on fine-tuning their content library, storing all reusable content in a structured approach that takes advantage of metadata, folders, subfolders, and tags to segment content by region, product, prospect type, fund type and more.

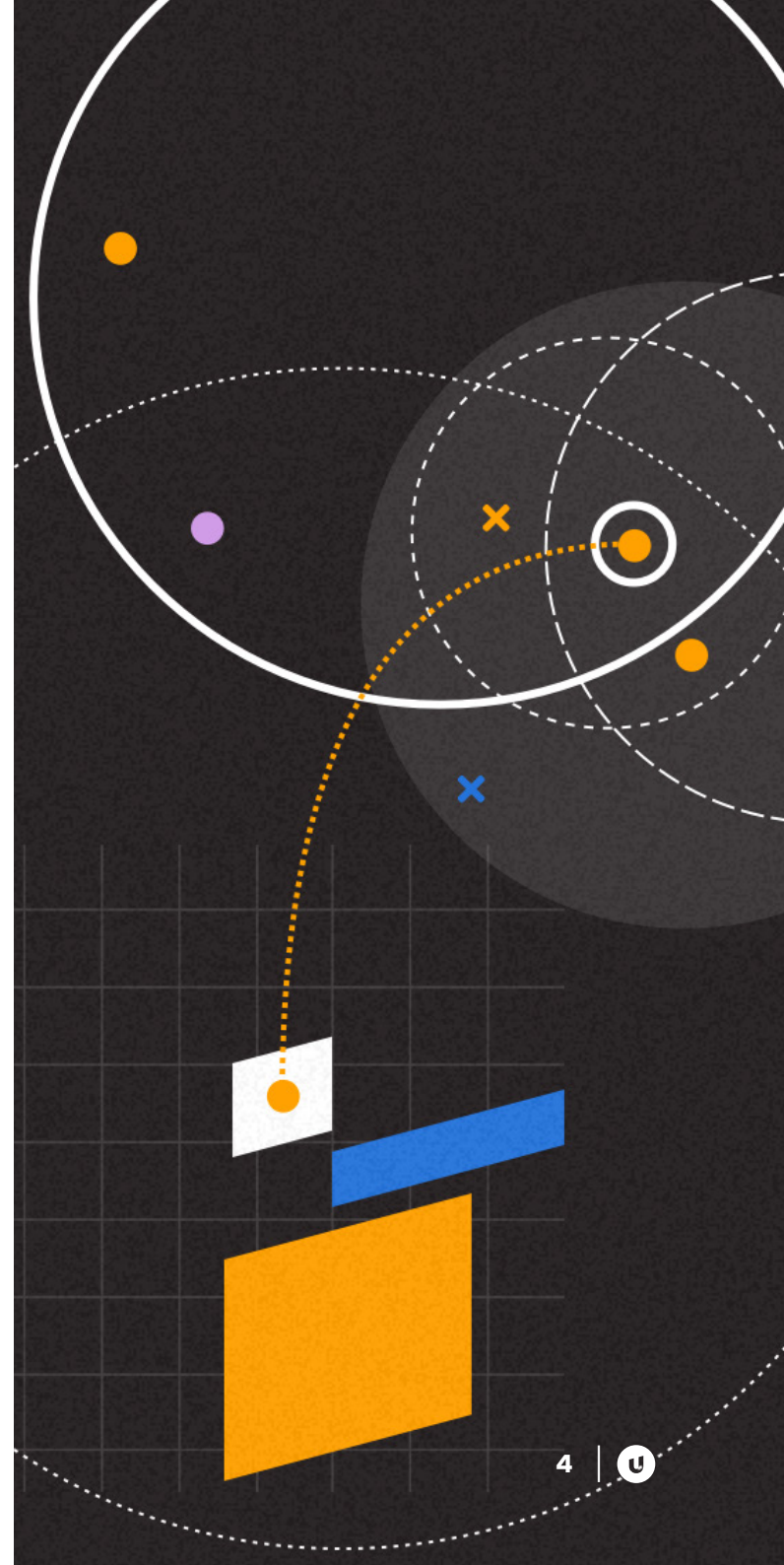
Next, knowing that audit-trails and data privacy were key, we highlighted how Qvidian stores a full version history of all uploaded content including audit trails and the ability to add automated expiration notifications.

Now this firm could be certain that all their content was secure, easy to find, and available to anyone writing a complex DDQ.

With automation, this firm drafted content 40% faster

Knowing this team was already burdened by a high-volume of complex requests, we used Qvidian's automation features to speed up initial draft creation and help users find content faster.

Teams were able to use machine learning to return top-matched answers to common questions, automate review tasks with multi-step workflows, and take advantage of color-coded progress tracking and email digests to speed up collaboration.



An end-to-end RFP Project workspace

Qvidian's Project workspace enabled this firm to produce proposals and respond to questionnaires faster than ever. With native integrations for Word, Excel, PPT, and PDF file-types and custom options for style templates, they were able to maintain the original client format while filing answers in Qvidian.

Additional collaboration features allowed them to keep their review process entirely in-product, minimizing security risks and improving overall response times.

Finally, Qvidian's automated document output generated complete RFP packets with all necessary components while also applying the firm's style template, branding, fonts, and formatting automatically.

Secure and compliant AI

A modern AI-powered solution was critical to this firm's overall success. They needed a platform that could help them use the generative features of AI while not exposing their customer data to increased risk.

With Qvidian's closed-loop environment, we provided this firm with a generative AI solution that solely referenced internal, firm-approved content. Additionally, our AI solutions aren't trained on customer data, feature no external API calls, and are fully SOC 2 secure. In layman's terms? We kept their data completely private, exposing no customer information!

This firm used Qvidian AI Assist to help generate new responses and revise existing responses using internal content. Additionally, they took advantage of Qvidian's ability to save, and share prompts to increase efficiency and consistency between regions and teams.

Additionally, SSO/SAML integrations provided secure identity management, API and CRM connections unified workflows with existing technology, and sandbox testing streamlined deployment. All of it resulted in faster onboarding, reduced IT overhead, and a smooth enterprise integration.

An AI-accelerated process that keeps data secure

With Qvidian this firm was able to transform their previous manual proposal process into an AI-accelerated process while keeping data secure. The final result was a 40% faster first-draft creation, a stronger content governance and compliance framework, and an overall higher response quality across regions and teams.

Results for this company

- 40% faster first-draft creation
- Higher response quality & consistency
- Stronger governance and compliance
- Improved collaboration across regions
- Reduced administrative burden
- Improved ability to scale
- Positive executive feedback and strong early adoption

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.

