



THE QVIDIAN EDGE: SUCCESS DECODED

Modernizing RFP & DDQ response for a wealth management and retail bank.

FINANCIAL SERVICES | TRANSFORMATION STORY



INDUSTRY

Wealth management

COMPANY

U.S. led wealth management
and retail banking

ESSENTIAL SALES DOCS

Request for information (RFIs)
Request for proposals (RFPs)
Due diligence questionnaires
(DDQs)

This U.S. led wealth management and retail banking institution operates across multiple regions. With a virtual contact center and centralized banking hubs they needed a strategy to rebuild their retail banking ecosystem as digital and cloud-first while continuing to support existing on-premise systems during transition. Their RFI/RFP/DDQ teams served institutional and retirement channels with ever growing adoption needs and frequent new user onboarding.



Can one company adopt a digital transformation that increases user adoption and streamlines document creation?

RFP Operations under strain

Like many financial institutions, this company was buried under a mountain of requests that seemed to grow larger every day. Using their legacy system wasn't working well; content lived in disparate files, responses required manual copy/pasting and plenty of inline edits, and formatting was all over the place.

Additionally, training materials were outdated, permissions and roles were inconsistent (allowing the accidental deletion of content), and over half of users simply weren't using available solutions. In short: their entire RFP operations were buckling under the strain of an outdated process.

What did our customer need? A complete transformation

Tackling an outdated process can be tough, but Qvidian brought the expertise needed to improve overall RFP operations. This customer needed some critical changes, such as:

1. A governed content library complete with versioning, expirations, and role-based access.
2. A faster way to produce first-drafts with automation while maintaining compliance.
3. A clear workflow process with reviews, accountability, and structured assignments built in.
4. A scalable enablement plan that helped onboard more users while providing relevant training and targeted analytics.
5. A phase-ready integration posture that allowed them to operate in today's hybrid state with on-premise and cloud capability.

Luckily, Qvidian offered the complete solution.



Getting to work: building a new process that made work meaningful

With the critical needs identified, the Qvidian team worked with this customer to build a brand-new process that transformed their work life, reducing strain, and making work meaningful again.

It started by implementing a single source of truth for reusable answers complete with granular permissions, content owners, expirations, and version history. With this new library, our customer was able to improve overall response times while maintaining compliance over key content.

Next came automation. Using this established single source of truth, teams could use Qvidian's automatic content suggestions to pull the best matching pieces of content or answers to key questions in seconds, eliminating the need for manual file searching. Additionally, Qvidian AI Assist allowed writers to generate new answers and revise existing ones by using only approved content. It also supported rules for tone, length, and translation while flagging AI-authorship for further human review—a must have for compliance.

An end-to-end workspace reduces errors and speeds up processes

By taking advantage of Qvidian's end-to-end Project workspace, users were able to upload Word/Excel/PDF questionnaires, answer directly in the project, route review and collaboration work via multi-step assignments, and apply final style templates all in one place.

This improved the consistency of every response by ensuring brand guidelines were followed, preserving formatting, and reducing friction that often led to delays or errors.

Training and analytics sealed the deal

While a new process is great, it's useless without user adoption or useful analytics. Our service team understood this intuitively and, knowing that user adoption was a critical customer ask, devised a blended enablement plan with on-demand modules and live sessions to boost enablement.

Additionally, our professional services team helped clean up various outdated and conflicting roles and permissions, provided custom training on the process, and crafted a usage dashboard which tracked adoption, RFP throughput and overall library health.

Armed with a shiny new (and totally useful) process, this organization was ready to make major changes and start winning more business.

With Qvidian, true organizational transformation was made possible

After implementation, this customer noticed significant changes to their process. They produced faster first drafts with fewer rework loops using a combination of AutoFill and Qvidian AI Assist. They improved their content structure, resulting in fewer errors and completely securing crucial data while improving reviewer confidence. Finally, their RFP project organization improved dramatically, allowing them clear visibility into seasonal dips, bottlenecks, and out-of-date content in dire need of review.

Results for this company

- Faster first drafts & fewer rework loops
- Improved governance & fewer errors
- Increased user adoption
- Repeatable, measurable operations

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.

