

DDQ Automation

Your SalesEdge Advantage

Easily capture compliant answers and quickly create documents for all your Due Diligence Questionnaires (DDQ)



Within minutes, create and deliver DDQ documents that include accurate and compliant information! Support all your routine response requirements:

- ▶ DDQ Questionnaires
- ▶ Client Questionnaires
- ▶ Standard or Sample RFPs

Compliant and Accurate Content.

Your DDQ and RFP response content is managed in the Qvidian RFP and proposal automation content library. Create one content record for each answer and associate the record with the appropriate questionnaires. When content is updated, the current answer immediately appears in all

Qvidian-automated DDQ documents – and is available for your RFP responses.

Generate Standard or Customized Documents. Create standard response document templates that always include the current answers. Automate response documents for subadvisor or client questionnaires, linking questions to answers managed in your Qvidian library. Click ‘build’ to create a response document that includes the most current answers extracted from your Qvidian content library.

Strengthen the Firm’s Brand. Deliver DDQ and client questionnaires that strengthen your clients’ experience with your brand. Use automated document technology to quickly and correctly apply the firm’s brand – or when required, reply using your client’s standard format requirements.

Easy Implementation Process. SalesEdge has mastered the process! Let us guide you through the process of automating DDQ documents. If you don’t have the time, let us do the work. SalesEdge can automate your DDQs and provide you with the skills to maintain the automated DDQ documents.

Using Qvidian RFP and proposal automation, you can efficiently deliver the right information to each client.

Compliance Empowered

Provide all content managers with the technology to keep DDQ and RFP content current and compliant.

Time is of the Essence

Streamline DDQ processes for content managers, subject matter experts, and compliance officers. Quickly deliver DDQ responses to each client.

First Impressions Matter

Seize the opportunity to make a great impression every time. Automate a DDQ template branded to your firm.

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