



# AI-powered RFP / DDQ Solution for Financial Services



# Executive Summary



## AI-powered RFP / DDQ Solution for Investment Management firms

We propose a tailored AI-powered RFP / DDQ Solution that reduces manual efforts by 70% for Investment Management firms, ensuring faster response times, improved accuracy, and scalable compliance management.

### Key Solution Features

- Automated, Intuitive Workflows → Reduces manual RFP / DDQ efforts by over 70%, enabling faster response times
- Centralized Knowledge Base → Simplifies knowledge retrieval, reducing time spent on repeated queries by 80%
- Pre-populated Answers with Confidence Scores → Ensures 85%+ accuracy (before human-review) lowering compliance risk
- Modular and Scalable Solution → Allows flexibility to start with a base module and expand across the broader customer organization

	Services	Outcomes	Timeline	Straive Team	Fees
1a	AI Build: PoC / Pilot	AI-powered RFP / DDQ Solution: PoC / Pilot Implementation	10 weeks	AI Marine Team <i>Architect, Data Scientists, LLM Engineers, Developers</i>	\$100K (one time)
1b	AI Build: Production	AI-powered RFP / DDQ Solution: Production Rollout	16-20 weeks		Time & Material
2	Operations Support	Extended Support Team for RFP / DDQ Response + Ongoing AI Enhancements	Ongoing / As Needed	RFP / DDQ Operations Support Team <i>1 Onsite Sr. Consultant + 2 Offshore Consultant/Data Scientist</i>	Time & Material

### About Straive

Owned by a top global PE firm (EQT), Straive is a leader in building enterprise data and AI solutions across multiple industries. Our core differentiators include extensive domain expertise across the entire investment value chain as well as advanced AI capabilities that have delivered 3-5x ROI for our clients. We serve over 200 clients in 30 countries, supported by a team of 20,000+ data analytics, AI, and operations professionals.

# Case Study: LLM-based RFP/DDQ automation for a top 25 asset manager driving 70% reduction in turnaround time

## Business Challenge

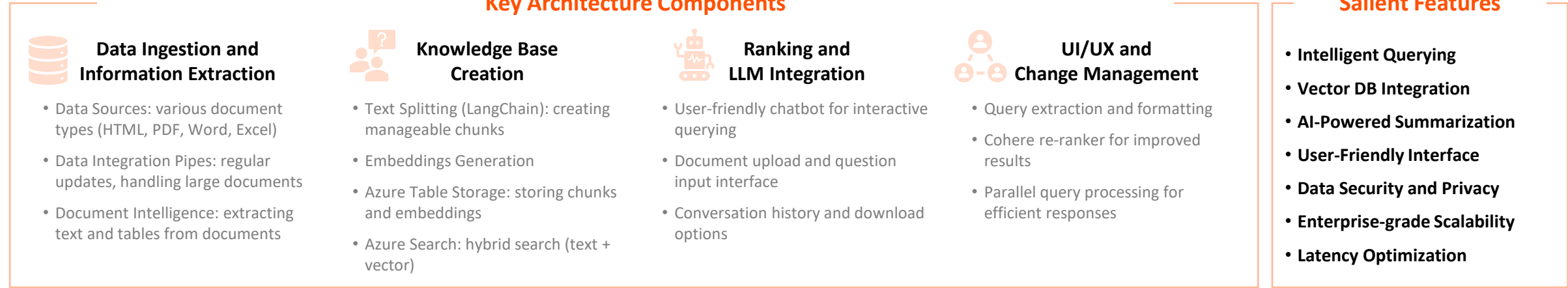
Our client had a team of 30+ RFP writers handling complex RFPs and DDQs across multiple investment products and was facing increasing pressure to streamline the proposal creation, enhance quality of response, while reducing the backlog.

- Lengthy RFP response cycles caused a slow turnaround and heavy reliance on manual efforts
- Inconsistent and error-prone content, risking credibility with prospects

## Straive Approach

- **LLM-driven Automation:** Leveraged GPT-based models for natural language understanding and document summarization
- **Knowledge Base:** Combined text and vector search to find relevant RFP responses quickly
- **User Interface:** Interactive chatbot for real-time querying, document upload, and conversation history

### Key Architecture Components



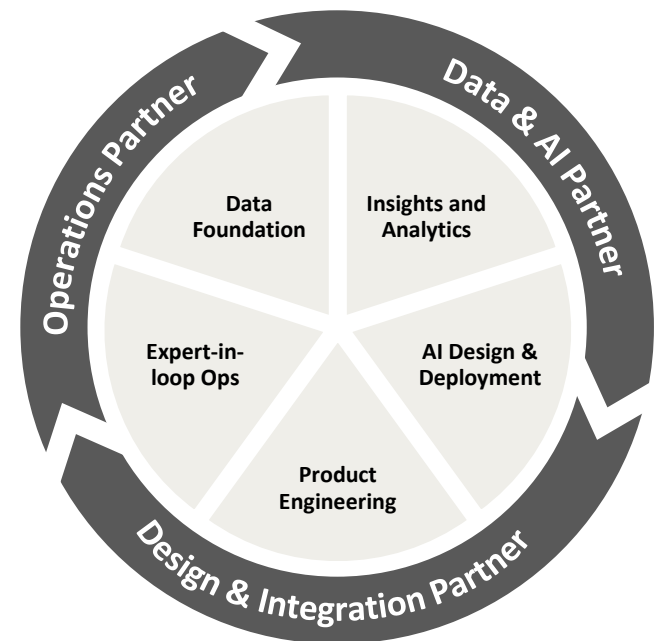
## Impact Delivered (post-production)

- **Efficiency Gain:** RFP response time was cut down by 70% (10-15x improvement)
- **Accuracy Boost:** 80-90% reduction in manual errors and standardized responses
- **Cost Savings:** Reduced manual labor and minimized submission delays
- **Improved Experience:** Faster, more consistent proposals enhancing client perception and personalized experience

# We Operationalize Data Analytics and AI for Global Enterprises

## Capabilities


Full-stack Data, Analytics, and AI Services




Three Partners in One

## Industries


Deep Domain Expertise




**Financial Services**




Retail, CPG, and Media




Logistics and Supply Chain



Pharma and Life Sciences



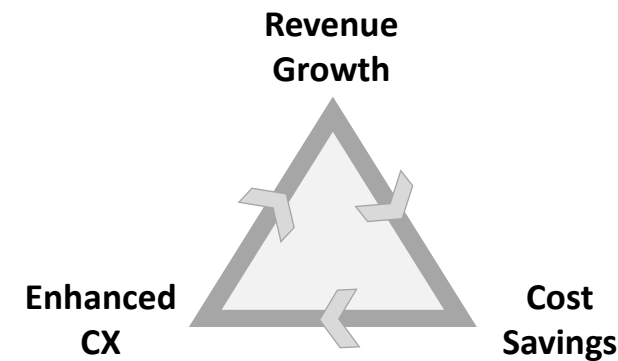
Science and Research



EdTech

## Outcomes

3-5x ROI Delivered for Large Enterprise Clients



## Global Scale

Onshore, Near-shore, and Offshore Delivery

20K+ Employees

350+ Clients

30+ Countries

Owned by EQT – A Top 5 PE Firm



## Investments

Talent, Accelerators, and Partnerships

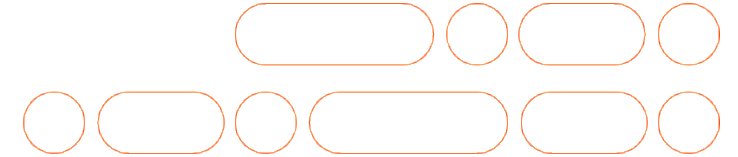
6K+ Domain Experts (CFAs, MBAs, Masters, PhDs)

100+ Pre-built Data & AI Accelerators

Deep Tech Partnerships



# Why Straive



## 1 Differentiated Value for the customer

Straive delivers AI-powered solutions that include streamlining **DDQ, KYC, client reporting, and reconciliation**, ensuring greater efficiency and accuracy.

By infusing AI into customer's existing workflows, we will help accelerate deal execution, strengthen compliance, and scale private wealth operations seamlessly.

## 2 Deep Experience in Investment Management

We work with **3 of the top 10 asset managers**, delivering AI-driven solutions across distribution, investment operations, and portfolio management.

We help our clients extract actionable insights from complex private market data and have delivered **\$15B+ in incremental AUM**, and **over 60% cost savings**.

## 3 AI Innovation with Cross-Industry Experience

With expertise in generative AI, predictive modeling, and data science, we bring **customizable, pre-built AI accelerators** that drive innovation at speed.

We've identified and developed **top 25+ AI use cases delivering significant ROI**, helping our clients optimize their operations and stay ahead of competition.

## 4 Delivery Excellence and Commercial Flexibility

Our AI solutions are available with **onshore, nearshore, and offshore support**, ensuring flexibility while maintaining quality and security.

With **outcome-based pricing**, our success is directly tied to your growth – maximizing efficiency, reducing costs, and improving investor returns.