

# Financial Services Success Story



*Since 2015, Sanlam has been using Qvidian Proposal Automation from nFold to save time and improve quality.*

## Overview

After evaluating several document automation systems, Sanlam chose Qvidian from nFold. At first, only two people in the institutional marketing team used the software, but since then the scope has grown to include more users & content and a wider application.

## Client

Sanlam Investments

## Sector

Asset Management

## Services

Qvidian Proposal Automation Software

## Named Users

15

## Duration

April 2015-Current

## Locations

Cape Town  
Johannesburg

## Challenge

Responding to questionnaires and tenders was time-consuming and deadlines are often tight. Finding the latest content and collecting responses from subject matter experts to compile the responses manually, was complex. Sanlam has several brands, and presentation content that changes each quarter, as well as a large team of client-facing people. It was difficult to manually select relevant content from about 300 slides and 30 topics and then apply the branding consistently.

## Approach

Each year, nFold provides coaching and configuration services that Sanlam uses to grow the way they use the software. A critical success factor for the project has been appointing a content administrator responsible for ensuring that subject matter experts provide the latest content.

## Outcome

Sanlam is now more proactive in the way they provide the right content to the right client at the right time, using Qvidian's content library, presentation wizard and RFP automation features. They create complex RFPs, DDQs and presentations faster, with more consistent branding.

## Testimonials

*"We use Qvidian to automate responses to due diligence questionnaires, manage our responses to requests for proposals, as well building pitch and client report-back presentations. In addition to the time saving and quality benefits we get from using the Qvidian software, the aftersales support we receive from the nFold team in terms of training and support is truly professional and is a big contributing factor in our choice of Qvidian from nFold as our preferred provider."*

**Brendan Smith**, Business Solutions Consultant, Client Solutions & Research

*"Denker Capital uses Qvidian primarily for the creation and storage of due diligence information. It has saved me days of work as the most relevant and up to date information is saved in the system, so I no longer need to trawl through old documents to find the correct information. We have also created standard due diligence documents for each of our capabilities which can be created in under five minutes. Lastly, the generic information is updated in one place and linked to the various files so duplication of data is minimised."*

**Cathy Fleming**, Business Development Specialist, Denker Capital

