

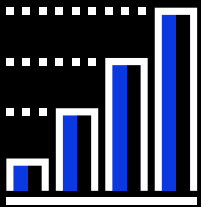
Loopio



Customer Success Story

How Research Affiliates Submits Compliant DDQs with a 62% Automation Rate

Success Snapshot



Nearly doubled automation rate to
62% in one year



Works on best-in-class answers to complex DDQs with
6 contributors or less



Maintains a lean, accurate library of
1,362 entries
for DDQs and investment FAQs

About Research Affiliates

Research Affiliates is a quantitative asset manager known for being one of the originators of smart beta and offering a multi-asset solution in partnership with world-leading financial institutions. With more than \$141 billion in assets tracking strategies, they aspire to be the preeminent source of insights and products that transform the global investment community for the benefit of investors.



“Working collaboratively on the same set of answers in Loopio allows us to be thorough and detailed without conducting redundant research or drafting another new version for compliance to approve.”

Thomas Verghese
Senior Analyst
Research Affiliates

Challenge

Answering DDQs Without Time or Headcount

Research Affiliates is a small but mighty firm with 68 employees across the U.S. and the U.K. The product management team is even smaller—just four people. Yet, the team tackles a vast remit: launching new products, crafting marketing materials, designing custom analytics, commissioning internal research, and much more.

That’s not all, either. They also manage due diligence questionnaires (DDQs). But unlike the rest of their work, these requests can become redundant or land without warning. “Every time we get a DDQ, that’s a significant imposition,” says Thomas Verghese, Senior Analyst. “We’ve got to shepherd our time carefully.”

And in the past, the team relied on experience and records of questionnaires. But searching old files devoured precious time in fulfilling time-sensitive requests—and minutes matter when everything must be compliance approved.

Not to mention, the majority of questions they received were the same from DDQ to DDQ. “There are a core set of questions that repeatedly come up in different variations,” says Thomas. So, this process also meant they’d keep multiple versions on file, which created ambiguity regarding which answer was the most current and relevant to that client.

They needed a way to maximize their time while maintaining accuracy—to work smarter, not harder. That’s where Loopio comes in.

Solution

Working on Best-in-Class Answers, Faster

Research Affiliates implemented Loopio's [DDQ software](#) in 2019—a couple of years before Thomas and his colleague Grant Kasser, Investment Analyst, joined the company. When they arrived, the platform was already up and running, collecting thousands of responses and powering the questionnaire process.

Despite being new, Loopio helped them get up to speed quickly, putting years of insights at their fingertips. When a DDQ arrives, they simply run Magic (Loopio's automation tool) to scour past answers from a central library and populate them into the questionnaire. "Magic handles most of the work for you," says Grant.

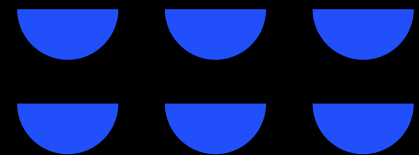
Thanks to automation, they spend more time working on best-in-class answers by pulling in multiple perspectives right in Loopio—including subject matter experts (like I.T.) to their Head of Product Management, Ari Polychronopoulos (*who has 20+ years of experience to tap into*). It's a shared collaborative space; even compliance can write comments like everyone else. That's a huge improvement from before.

It all comes back to time management. "You have to make a little go a long way when you have a small team," Thomas says. Instead of spending time searching old questionnaires for answers, they can collaborate with colleagues on best-in-class answers, get approval from compliance, and respond to DDQs faster.



"Instead of sending a DDQ to compliance and going back and forth for approval, we can assign answers to them in Loopio where they can leave comments directly. So, the final response we're exporting is already compliance-approved."

Grant Kasser,
Investment Analyst
Research Affiliates





“With all our answers stored in one place, I can always count on my team for the first pass. When it’s time to review, I pop into Loopio and provide my take. It’s quick and easy.”

Ari Polychronopoulos,
Head of Product Management
Research Affiliates

Results

A Small But Mighty Team With 62% DDQ Automation

Since coming on board, Thomas and Grant have optimized their DDQ process with Loopio. While Grant diligently learns how to use new features, Thomas leads the charge in maintaining a lean, accurate library. “We’re working on simplifying questions to one ‘super answer’ that we can trim down as we go.” He explains.

Together, they have achieved the following results:

- **Standardized content:** Reduced nearly-duplicate answers by building a lean library of 1,362 entries—which they can quickly refresh with new values.
- **Faster responses:** They cut redundant work and saved time by doubling their automation rate to 62% using [Magic best practices](#).
- **Store other FAQs:** DDQs were only the start. They also use Loopio to maintain common questions about their investment strategies through [RAFI Indices](#).

Loopio has empowered them to work smarter. Without adding any extra employees, they’ve answered hundreds of complex questions without compromising their other duties. Today, they’re still a small team, but they are mightier than ever.

Learn Why 1,300+ Companies Love Loopio

Loopio's response management software makes responding to RFPs, DDQs, and security questionnaires faster and easier.

See for yourself.

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