

Case Study: Cut Due Diligence Timelines by 70% and Double Response Capacity

The Challenge: Due diligence is slow, fragmented, and costly. Wealth managers spend too much time consolidating data, while asset managers face weeks-long DDQ/RFP cycles. The outcome: inefficiency, higher risk, and missed opportunities.

The Current State

Goal:

Modernize due diligence—cut cycle times, reduce risk, and free teams to focus on decisions and growth.

Customer Testimonial

“Annual questionnaire response times dropped by 50%, thanks to the ease of use for both senders and recipients.”

Our Solution: FLX Diligence Center replaces outdated manual processes with a digital-first platform that saves time, reduces risk, and scales with growth. It streamlines wealth management's diligence of asset managers through:



Automated Workflows – Eliminate manual tracking, reminders, and follow-ups.



Centralized Content – Create a single source of truth for data, documents, and reporting.



Real-Time Collaboration – Enable seamless teamwork across wealth managers, asset managers, and institutional investors.

The FLX Advantage

Cost Savings



- 70% faster cycles: Overall due diligence timelines cut from 3 months to under 1 month.
- Up to 320 hours saved per year: measurable efficiency gains.
- \$5,000–\$10,000 extra fees generated: by redeploying resources into higher-value client work.

Growth Potential



- 10,000+ managers already connected to the platform.
- Broader manager coverage with less friction and faster turnaround.
- Teams focus on analysis, risk oversight, and investor engagement instead of chasing data.

Productivity



- 50% faster responses: Questionnaire completion cut from 2 months to 1 month.
- 5× productivity gains: Automated reminders, workflows, and dashboards free teams from low-value admin.

