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SOLUTION-BRIEF



Intelligence behind every submission Solution

Intelligent Mandate Pursuit & Due Diligence
Automation for Wealth and Asset Management





Intelligence behind every submission.

Solution Brief – Intelligent Mandate Pursuit & Due Diligence Automation for Wealth and Asset Management

MandateLens, brought to you by **EvoluteIQ** along with **NuSummit** as our Domain & Implementation Partner, is an agentic AI solution for wealth and asset management firms: a pipeline of specialist AI agents, each owning one step of mandate pursuit and due diligence, with human approval gates between them. It transforms trusted institutional knowledge into submission-ready responses, **reducing turnaround times by up to 40-60%, improving response quality and consistency, and increasing capacity to pursue more opportunities without adding headcount.**

Because in a competitive investment landscape, the speed, accuracy, and consistency of investor communications can directly influence mandate outcomes.

40-60%

Faster response
turnaround

30-40%

Of response effort
reclaimed from
searching

60-80%

Reduction in
duplicate work on
repeat questions

The impact MandateLens delivers

The Challenge

Wealth and asset management firms operate in an increasingly competitive environment, where responding quickly, accurately, and consistently to investor requests can directly impact growth and mandate success. Teams must coordinate information across investment, compliance, legal, marketing, and client-facing functions, yet the underlying knowledge required is often fragmented across documents, systems, and subject matter experts.



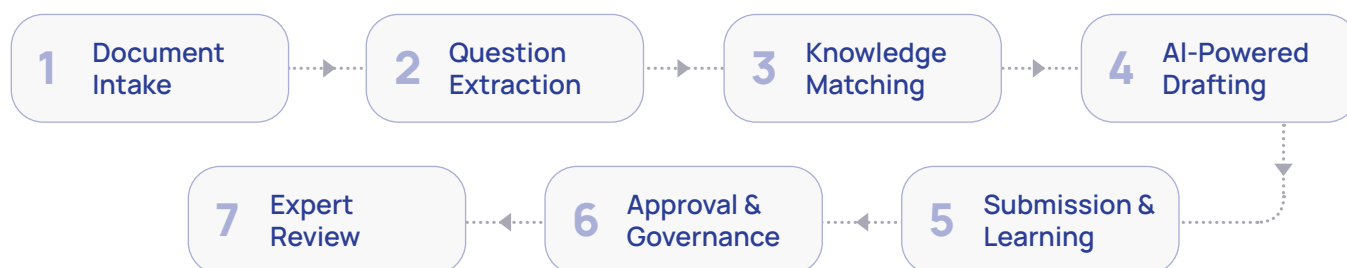
Sources: Loopio 2026 RFP Trends Report; Cerulli Associates; Arphie 2025

This creates real risk, not just inefficiency: with 60–80% of questions repeating across submissions, teams spend most of their capacity recreating answers the firm has already approved; inconsistent or outdated information creates regulatory, compliance, and reputational exposure; and tight timelines leave limited room for thorough review. Institutional knowledge that lives in a few people's heads is difficult to retain, govern, and scale, and growing response volumes only increase the pressure.

The next generation of mandate pursuit and due diligence operations requires more than manual coordination and disconnected content. It takes a system that knows which answer is approved, who owns it, and when it was last verified — and can prove all three on demand.

How MandateLens Works

MandateLens runs as a pipeline of specialist agents over one governed knowledge base. The knowledge base holds firm facts and approved answers as the single source of truth; each agent takes a single job; qualify the incoming file, extract the questions, group near-duplicates, classify by category, retrieve approved answers, isolate low-confidence items, fill remaining gaps from firm facts - and hands its output to the next, so every answer arrives with a citation and a confidence score; and no answer advances to the next stage until a human reviewer who owns that domain has approved it.



The seven-stage MandateLens workflow

Missing information is flagged rather than fabricated, and contradictions across a submission are caught automatically. Every draft, edit, and approval is timestamped in an immutable, exportable audit log, backed by role-based access controls and automatic attachment of required compliance disclosures, so governance teams can demonstrate exactly how each response was produced.

MandateLens is seeded from two sources the firm already maintains: a firm-facts set covering company profile, ownership, fee schedules, certifications, and past performance; and a question bank of previously approved responses. Completed submissions are exported as a single assembled document with the audit trail attached, so the output is ready for review and dispatch rather than reformatting.

Who Uses MandateLens

The agents draft; these four personas decide. Responsibilities are separated so that knowledge ownership, domain review, and final sign-off never sit with the same person – the control that makes automated drafting defensible to a regulator.

A	Admin	Owns the governed knowledge base – firm facts and the approved Q&A bank – plus configurations and the category vault. Holds full workspace visibility and audit rights.
RA	RFP Analyst	Runs the submission end to end: routes questions for domain review, chases outstanding items, and coordinates approvals. Full workspace visibility and audit rights.
SME	Domain Expert / SME	Receives questions assigned by domain expertise. Approves or flags answers within their own area only – no cross-domain sign-off.
DH	Distribution Head	Holds final approval on the assembled response. Sign-off releases the submission and feeds approved answers back into the Q&A bank.

Admin	RFP Analyst	Domain Expert / SME	Distribution Head
Publishes the knowledge base, configuration, and category vault the workspace runs on.	Routes each question for domain-based review and tracks what is outstanding.	Approves or flags answers inside their own domain, then returns them.	Gives final sign-off; the approved response feeds the Q&A bank improvement loop.

How the four personas hand off – Admin and RFP Analyst share full workspace visibility and audit rights; SME and Distribution Head receive submissions by assignment.

High-Value Use Cases

01	RFP Response Automation	Automate the extraction, drafting, review, and completion of Requests for Proposal and competitive mandate submissions using approved firm knowledge.
02	Investor Due Diligence Automation	Accelerate the completion of due diligence responses using firm-approved content and compliance documentation.
03	Consultant Questionnaire Management	Respond faster to consultant databases and institutional investor questionnaires through intelligent matching.
04	Compliance & Regulatory Response Management	Ensure responses are governed, reviewable, auditable, and aligned with regulatory obligations.
05	SME Collaboration & Approval Workflows	Coordinate reviews and approvals across portfolio managers, compliance officers, legal teams, and business stakeholders.

Business Outcomes

Accuracy & Consistency Every RFP and consultant questionnaire response draws on one approved answer set, so the firm speaks with a single voice.	Reduced Manual Effort Drafting, review, and approval activity is automated end to end, freeing senior specialists for judgement work.
Governance & Audit Readiness Immutable audit logs, role-based access controls, and automatic compliance disclosures on every submission.	Reduced Manual Effort Investment, compliance, legal, and client-facing teams review and approve inside one governed workspace.
Compounding Knowledge Each approved response feeds the knowledge base, so the institutional repository improves with every pursuit.	Faster Turnaround – 40–60% Every pursuit reaches submission sooner, with no increase in team size.

Why MandateLens?

Wealth and asset management firms don't need another standalone AI tool. They need a practical way to apply AI within the workflows that already drive mandate pursuits, investor due diligence, and client communications.

MandateLens sits inside those workflows rather than beside them: every answer is generated from firm-approved content, carries its source citation and a confidence score, and reaches a named human reviewer before it reaches an investor. That combination — grounded drafting, domain-based review, and a defensible audit trail — is what separates it from a general-purpose AI assistant or a static content library.

Built for wealth and asset management and capital markets firms. To see MandateLens run against your own RFP and due diligence templates, write to collaborate@evoluteiq.com.

Respond with confidence. Pursue more opportunities. Scale intelligently.

[See MandateLens in Action](#)

About NuSummit

NuSummit is a global technology leader in AI-led digital transformation, specializing in applications, data, analytics, cloud, and cybersecurity. With over 300 clients worldwide, including 22 Fortune 500 companies, NuSummit supports organizations across industries. Our core expertise lies in banking, insurance, and capital markets, where we offer specialized solutions for these sectors.

With over two decades of experience and 3,000+ professionals, we deliver AI-driven, end-to-end solutions that integrate advanced cloud infrastructure and cybersecurity. Certified to top industry standards and backed by a robust partner ecosystem of hyperscalers and niche innovators, NuSummit is a trusted partner for secure, impactful digital innovation.

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