

ModuleQ

POWERED BY
REFINITIV®



MODULEQ + REFINITIV: EMPOWERING PROFESSIONALS TO SEIZE OPPORTUNITIES FASTER WITH AI-POWERED INSIGHTS IN MICROSOFT TEAMS

Executive Summary

As the volume and consumption of data continues to increase, professionals look for ways to surface mission critical, decision-making content when they need it.

ModuleQ's unique People-Facing AI cuts through the noise with timely insights about important market/corporate developments and upcoming meetings, automatically tailored to each professional's current work. Leveraging proprietary machine learning algorithms, cutting-edge Refinitiv technologies, and real-time work data from Microsoft 365, People-Facing AI predicts and delivers the information professionals need, right when they need it. ModuleQ integrates seamlessly into Microsoft Teams, meaning insights are effortlessly available and easily shareable.

CUSTOMER CHALLENGE:

Applying AI to overcome information overload

Amidst the explosion of digital data, greatly increased volatility, intense competition, and the sudden transition to remote and distributed work, it's becoming harder to find the critical information required to seize fleeting opportunities and nurture essential business relationships. Professionals face information overload and struggle to extract crucial signals from a deafening roar of noise.

To overcome these challenges, leading enterprises are turning to AI solutions that amplify the capabilities of their people. [“AI’s superpower in retaining, recalling, and analyzing massive amounts of data can help parse signal from noise,” says Jon Friedman](#) chief designer of Microsoft Office products. [According to Accenture](#), “businesses are increasingly leveraging AI, and it’s quickly becoming a strategic imperative.” 73% of organizations are already adopting AI, and 84% of executives believe AI will be essential to achieve their growth objectives.

ModuleQ and Refinitiv have partnered to provide turnkey AI solutions that cut through the noise with timely/breaking insights, automatically personalized to the current needs of each individual professional.

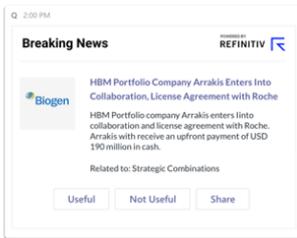
CUSTOMER BENEFITS OF THE MODULEQ SOLUTION

By elevating the signal above the noise and delivering insights directly into Microsoft Teams, ModuleQ empowers professionals to:

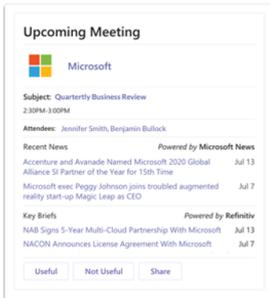
1. Recognize and seize fleeting opportunities ahead of the competition.
2. Earn trust and long-term loyalty of demanding clients by staying keenly aware of the events and trends that impact their clients’ business.
3. Build high-value partnerships by proactively reaching out to clients, instead of reactively fielding client inquiries.
4. Easily and quickly share relevant information with coworkers and teams.
5. Learn from the collective intelligence of their organization as AI automatically optimizes the flow of information to individuals and teams.



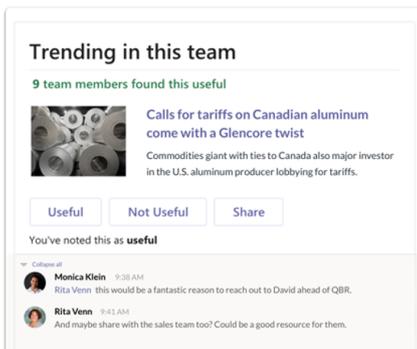
ModuleQ AI case studies: the critical information you need finds you



NEWS ALERT: Investment banker Amelia has been cultivating a client in the biotech industry. ModuleQ alerts her to a strategic alliance announced by an adjacent firm. Amelia calls the client CEO with the news, pitches possible responses, and secures a follow-up meeting, all before the competition has even seen the announcement.



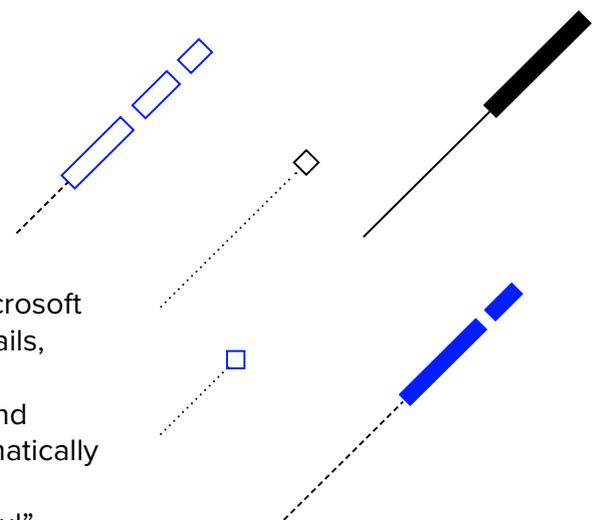
MEETING BACKGROUNDER: Private equity investor Benjamin has a full day of update meetings with companies he's following. Ahead of each meeting, ModuleQ sends him a backgrounder with recent events, developments, news, and research relevant to the meeting. Instead of spending his limited time getting oriented, Bertrand can jump right to substantive questions and decisions.



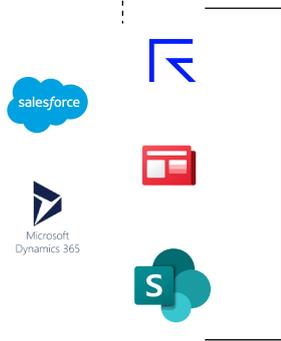
OPPORTUNITY TO CALL: Relationship manager Clara is always looking for opportunities to connect with clients and offer more and higher-value services. ModuleQ alerts her to a report about a major trade dispute that's trending in the Best Practices channel for her target vertical. Her colleagues are already jumping in with suggestions about how the company's trade finance and FX hedging services can help clients respond. Clara picks up a few ideas and starts calling clients.

How ModuleQ works

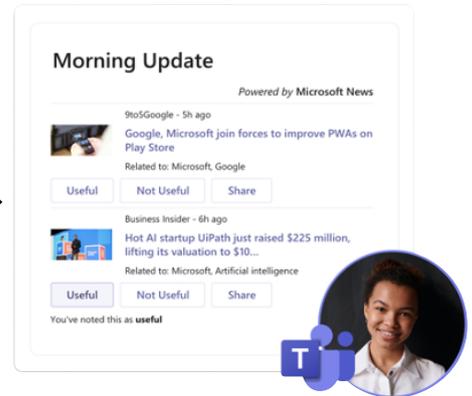
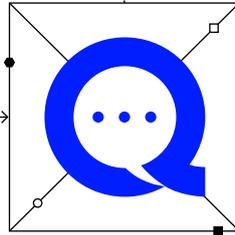
ModuleQ People-Facing AI integrates into your organization's Microsoft infrastructure and uses real-time collaboration data – such as emails, meetings, and contacts – to understand the changing business landscape of each individual professional. As work progresses and priorities change, the AI tracks the user's shifting focus and automatically adjusts its recommendations accordingly. Professionals can also train the ModuleQ AI directly by providing "Useful" and "Not Useful" feedback or adding specific companies and topics to their profiles.



BUSINESS INFORMATION



MODULEQ AI



To provide the most powerful and targeted insights, ModuleQ AI continuously ingests content from Refinitiv and Microsoft News (over 4,000 publishers globally). Refinitiv Intelligent Tagging, a cutting edge natural language processing solution highly optimized for business and finance applications, is used to interpret the relevance and significance of each content item. Finally, proprietary algorithms predict the specific news and insights that will most greatly benefit each individual user.

For security and compliance, the ModuleQ AI platform is deployed inside your organization's Microsoft Azure tenant. Sensitive information remains under your control at all times, never leaving the secure perimeter of your organization.

Contact for more information

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We are currently exploring how various Refinitiv content sets can be used by customers within the Q application and plan to offer this capability to customers.

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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