

# FACTSET PROFESSIONAL SERVICES: TRANSITION SERVICES

› Successfully manage firm-wide changes, including organizational shifts and feed migrations, with the support of FactSet Professional Services.



## **REDUCE THE CHALLENGES OF LARGE-SCALE ENTERPRISE CHANGES**

Place the burden of significant firm-wide changes, such as organizational shifts, mergers and acquisitions, and feed migrations, on FactSet specialists. Rely on these professionals to guide your firm through major initiatives with project management plans designed for your FactSet footprint. Ensure a seamless transition as the transition services team guides you from collaborative requirement gathering and strategy sessions all the way to go-live preparation and execution.



## **TAKE ADVANTAGE OF DECADES OF INDUSTRY KNOWLEDGE AND FACTSET EXPERIENCE**

Benefit from the in-house expertise of FactSet specialists, who understand the downstream implications of your firm's initiatives, as well as the resources and steps needed to manage these changes. Professional Services engagements are staffed by senior members of FactSet's Global Client Solutions Group, who provide a wealth of knowledge gleaned from their experience servicing client organizational shifts. Project leads have completed CAPM or PRINCE2 certification for project management to ensure your engagement is organized and that timelines are optimized.



## **ELIMINATE MULTIPLE POINTS OF CONTACT WITH A SINGLE PROJECT LEAD**

Rely on your transition project lead to define objectives, identify team roles and responsibilities, deliver on designated milestones, and keep to your agreed-upon timeline. Reduce the need to personally manage multiple FactSet parties, as this team leader oversees your entire transition process, including resource coordination among FactSet's administrative, security, and technology teams.



## **GAIN FULL TRANSPARENCY WITH FACTSET'S IMPLEMENTATION TRACKER**

Ensure alignment with the FactSet team through our robust Implementation Tracker, which highlights best practices for FactSet client transitions. Access a master plan for your project, monitor progress with timely status updates on deliverables, and communicate with your FactSet transition team in a real-time, documented format.