

# NEWLY MERGED ASSET MANAGEMENT FIRM AND INVESTMENT MANAGER REDUCE INTEGRATION TIME BY 75%

› A global asset management firm and its newly acquired franchise seamlessly merge their FactSet environments and data processes.



**AUM**  
\$50 B

**FIRM TYPE**  
Multi-boutique asset management firm

**THE CHALLENGE**  
Integrate independently managed analytics processes, models, feeds, and research operations

**FACTSET SOLUTION**  
FactSet Transition Services

With two distinct FactSet environments, complete with unique analytics processes, models, feeds, and research operations, the large asset management firm and its new addition needed a way to synchronize and merge workstation solutions.

## The Challenge

When a \$50 billion asset management firm with nearly a dozen independently operated boutiques took steps to acquire an additional franchise, executives saw opportunity on the horizon. The chance to further diversify its investment strategy, grow its distribution network, invest in impactful business areas, and enhance client service was appealing to leaders at this global operation.

However, once the acquisition was finalized, members of each firm realized they had a long way to go before they could begin operating as one cohesive unit.

With two distinct FactSet environments, complete with unique analytics processes, models, feeds, and research operations, the large asset management firm and its new addition needed a way to synchronize and merge workstation solutions. Having acquired a number of small shops in the past, employees at the asset manager expected to be involved in merger activities for at least a full calendar year.

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FactSet's Professional Services offerings were designed to assist clients in navigating efficient and scalable FactSet solutions.

### The Solution

FactSet's Professional Services offerings were designed to assist clients in navigating significant firm-wide changes, including organizational shifts, feed migrations, and mergers and acquisitions. These senior, experienced members of FactSet's Global Client Solutions Group understand the full downstream implications of large-scale enterprise changes, and can supplement a firm's staff with the resources and expertise to manage such changes.

Successfully merging the asset manager's environment with the newly acquired firm's was critical to fully realize the synergies of the merger, as these directories' references could be found all over the two teams' FactSet solutions. From screening and portfolio analysis to alpha testing and risk attribution, each team relied on their unique references and data to power their workflows.

The asset manager's dedicated FactSet team included a business strategist who, having completed the Certified Associate in Project Management training, served as the firm's single point of contact and was responsible for defining objectives, designing the transition strategy, and managing all timelines. This strategist quickly created a project road map that would ensure the two entities' directories were audited that their environments would be synchronized, and that critical data, including portfolio feeds and references, would be seamlessly merged.



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With the support of FactSet Professional Services, the asset manager and its new franchise were fully merged in just 12 weeks—a quarter of the time they had experienced in the past.

### The Result

With the support of FactSet Professional Services, the asset manager and its new franchise were fully merged in just 12 weeks—a quarter of the time it had experienced in the past. This 75% reduction in the overall timeline took place without an increase in resources or headcount, as the Professional Services experts served as a highly qualified extension of the asset manager's team.

By connecting with a single point of contact as opposed to disparate team leads, the asset manager experienced streamlined communication and a nearly hands-off transition.

FactSet's Implementation Tracker offered a clear line of sight to the members of the asset management team, allowing them transparency into the integration's progress, providing timely status updates, and enabling them to communicate with their project lead in a real-time, documented format. It also offered a consolidated agenda for the firm's weekly calls with its FactSet team.