

# GLOBAL MULTI-BILLION DOLLAR BANK GAINS COMPREHENSIVE SELL-SIDE RESEARCH WORKFLOW WITH FACTSET

› FactSet's focus on white glove service results in a seamless deployment for a leading global bank.



**AUM**  
\$317B

**FIRM TYPE**  
Global Bank

**FACTSET SOLUTION**  
Solutions for Sell-Side Research, including Company and Market Data, StreetAccount News, and Microsoft Office Integration

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The bank's research team sought a partner that offered top-of-the-line service, transparency, and responsiveness.

## The Challenge

The sell-side research department of a major global bank searches for a complete solution for its daily processes, backed by a responsive, high-end service model.

While seeking to replace its data and analytics provider, the sell-side research arm of an international multi-billion-dollar bank ranked client service high on its list of priorities. Long dissatisfied by its existing provider's service model, feeling undervalued as a client and as though it was being held hostage by its enterprise license, the bank's research team sought a partner that offered top-of-the-line service, transparency, and responsiveness.

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Prior to deployment, FactSet created tailored workspaces for each analyst, complete with unique reports and watchlists.

Additionally, the bank needed a single solution for research analysts spanning the Americas, Asia-Pacific, Europe, the Middle East, and Africa that would provide access to both standard market data as well as unique content. For the bank's research analysts, instant access to market-moving news and insights was crucial, as was seamless integration with Microsoft Office.

Hindering the bank's search for a new platform was apprehension among analysts about the transition. Critical to making any move from their incumbent provider would be a vendor deployment team that could ensure a seamless transfer, complete with tailored workspaces and reports ready from day one.

### The Solution

[Comprehensive data, a customizable and intuitive workstation, and industry-leading service ensure a smooth transition.](#)

FactSet's transition team offered the bank a clear workstation solution, including calendar functionality that allowed analysts to receive up-to-the second insights about the companies they track, comprehensive company and security overviews, ownership data, and robust filings data with transparent audit trails. FactSet also provided unique content that the analysts had not had access to with their prior solution, including geographic revenue exposure data to show analysts a company's true exposure to geopolitical risk, macroeconomic factors, and market conditions, beyond country or region of domicile.

To fully understand the challenges the bank's nearly 500 research analysts faced and how FactSet's data and analytics could add value to the global team's workflow, FactSet implemented a multi-phased deployment. In only 10 weeks, FactSet successfully converted 85% of the 700 models that the firm relied on globally.

In addition to giving the bank's research teams access to the individual tools they needed to effectively analyze companies, industries, and markets, FactSet offered an integrated, easy-to-navigate platform that was specific to each user's workflow. Prior to deployment, FactSet implementation specialists and client support representatives created tailored workspaces



for each analyst, complete with unique reports and watchlists. This level of customization and focus on customer service helped ease decision-makers' minds regarding the upcoming transition.

### The Result

[FactSet's client support team offers an extension to the bank's own workforce.](#)

After a successful pilot campaign, the research analysts were more convinced than ever that FactSet's major advantage was its service model. After feeling undervalued as a client and beholden to an enterprise license, the analysts were delighted by FactSet's knowledgeable, accessible client support team, dedication to becoming an extension of their workforce, and ability to quickly respond to customization requests. Users on the sell-side research team continue to be so pleased with their solution, the bank's equity sales department is now evaluating FactSet for a pilot program, and the research team is considering how FactSet can add value with its content and technology offerings.

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