



ABOUT THE FIRM

A commercial banking division at one of the world’s largest banking and financial services holding company uses its relationship managers and digital capabilities to connect large and small businesses to opportunities by offering cross-broker trade and treasury services. The firm supports its clients by providing digital tools to expertly manage their finances and raise capital from stocks and bonds.



THE CHALLENGE

- Time-consuming efforts to gather financial figures using custom methodology
- Manual presentation building process
- Lack of adoption and ease of use with existing solutions



THE SOLUTION

- Accurate, customized methodology for financial metrics
- Automation of 277 data points
- Linking capabilities from Microsoft Excel to PowerPoint to seamlessly update presentations



THE RESULTS

- Reduced time spent on manual calculations and efforts by 98%
- Increased efficiencies from the integration of FactSet’s Productivity Suite tools
- Well-positioned to grow new and existing business

Global Commercial Bank Automates Manual Tasks and Increases Efficiency with FactSet’s Productivity Suite

One of the world’s largest commercial banks reduced time spent manually calculating customized financials and formatting reports, leaving it more time to uncover opportunities for business growth.

THE CHALLENGE

Relationship managers at a large global commercial bank are responsible for retaining, expanding, and discovering new clients. To uncover business opportunities, they rely on spreadsheets and presentations to help them analyze the current financial statuses (including working capital) of clients and prospects.

Extracting accurate financial data was a time-consuming, manual process. Relationship managers relied on an internal tool that was not intuitive or widely adopted. Members of the team needed an automated solution that would provide them with a streamlined, pre-meeting presentation that highlighted clients’ financials and other relevant data points against a defined peer universe.

After implementing FactSet's Productivity Suite tools, the bank can now efficiently arm its relationship managers with information that was once time-consuming to obtain.

THE SOLUTION

The Senior Business Manager of the commercial bank was introduced to FactSet through existing contacts at the firm. After seeing how intuitive and customizable FactSet's Productivity Suite tools were, they knew this would be a beneficial partnership.

To address the difficulty of pulling accurate financial data, FactSet's consulting team carefully reviewed the custom methodology the relationship managers were looking to follow. Keeping this in mind, the team built a spreadsheet using refreshable formulas to pull accurate metrics that relationship managers can use to assess the financial health of companies.

277 98% 220

Data points
automated

Reduced time
spent on manual
calculations

FactSet
workstations
deployed

To streamline the creation of pre-meeting presentations, PowerPoint decks fed by data from this Excel spreadsheet were compiled using stable and reliable Presentation Linking tools. This helped ensure that presentations reflected the most up-to-date Excel data, charts, and client-specific formatting. Relationship managers can now quickly update and refresh this presentation for different companies with the click of a button, leaving more time to prepare for value-add client meetings.

THE RESULTS

After implementing FactSet's Productivity Suite tools, the bank can now efficiently arm its relationship managers with information that was once time-consuming to obtain.

FactSet helped the bank become more efficient by automating data pulls and streamlining their presentation-building process with access to Productivity Suite tools. Instead of manually copying and pasting nearly 277 data points and charts from Excel to PowerPoint, these fields can simultaneously be updated in under one minute. Overall, Presentation Linking helped save relationship managers one hour+ each time a deck is refreshed. That time can now be put towards other meaningful projects.

FactSet's Productivity Suite tools has increased the firm's efficiency in creating client-ready presentations and provides nearly 220 relationship managers with newly-equipped FactSet Workstations.

Now, relationship managers can go into meetings prepared and well-versed on existing and potential clients' financial landscapes compared to their peers; ultimately putting them in a great position to grow their business.

DISCOVER SOLUTIONS

FactSet creates data and technology solutions for investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

FactSet's Productivity Suite

Sync information and automate repetitive tasks so you can focus on strategic investment analysis.

GET STARTED

Sell-Side Research Solutions

Streamline your research process with highly configurable model creation, publication, and distribution tools.

GET STARTED