



ABOUT THE FIRM

This multinational professional services network provides audit and assurance, consulting, financial advisory, risk advisory, tax, and related services to a broad cross-section of the largest corporations and governmental agencies.



THE CHALLENGE

- Limited access to private markets data
- Sought to expand market reach
- Needed to improve client services



THE SOLUTION

- Power internal portals with robust private markets data
- Reduce reliance on disparate systems
- Dedicated support resources from FactSet



THE RESULTS

- Stopped paying for numerous providers
- Regained multiple hours per week
- Improved client service with increased support capabilities

Global Big Four Firm Expands Market Reach with FactSet’s Private Markets Data

By partnering with FactSet, the firm unlocked deeper insights into the private markets landscape.

THE CHALLENGE

Around 3,000 market intelligence professionals at a global Big Four professional services, consulting, and accounting firm struggled with the same issue—how to better understand the private markets landscape. While access to public company content was easy to get, the firm struck out on finding high-quality private company and private equity data. Their existing sources proved unreliable, inaccurate, and sometimes completely out of date, not to mention associates wasted valuable time navigating between platforms to find the data and insights they needed.

Inconsistent access to private markets data limited the team’s ability to conduct market intelligence research on their coverage universe, hurting successful business development efforts and impacting client service.

“We believe that our relationship with FactSet and our use of their data will help increase new business opportunities with private companies, private equity firms, and their portfolio companies.”

THE SOLUTION

The selection process went like this: the firm’s market intelligence team thoroughly evaluated seven data providers for completeness, relevance, timeliness, and quality. They also looked at the integration capabilities of potential providers and of course, cost.

FactSet hit all the marks.

The firm’s key decision makers viewed FactSet’s private company profile data—investors, financing, executives roster, and more—as the highest “price to value” because of its comprehensiveness. With FactSet, the entire private company dataset was mapped to the firm’s internal identifiers making it easy for users to quickly find the information they need.

Not only does FactSet’s high-quality data meet their requirements, but a seamless integration within the firm’s internal system enables them to quickly put the data to use. The team appreciates FactSet’s human, people-centric approach that stands out as a true partnership. The firm receives support from a dedicated team of six data and technology subject matter experts who provide a deep understanding of the data and where it comes from, plus guidance on how to use the system efficiently.

THE RESULTS

With FactSet, the firm provides its market intelligence team with access to consistent, real-time, industry, segment, and service offering data directly integrated into their market intelligence portal. They use the new private markets data to drive informed, prompt, smart decision making at the local, regional, and enterprise levels. High quality connected data removes the roadblocks caused by using multiple providers, making associates’ day-to-day workflows smoother. The firm also stopped spending extra money on multiple providers, ultimately lowering total cost of ownership.

Consultants regained multiple hours per week to support existing clients and find new ones, helping increase business development and unlock a new, improved client service level. Early results show an increase in new meetings generated with private equity clients.

With a growing pipeline of potential new mandates, the firm’s leadership said they are already seeing a direct return on investment from their decision to partner with FactSet.

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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.

Private Equity/Venture Capital

Maximize your private markets ROI with impactful data and analytics.

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Data Management Solutions

Uncover connection using security-and entity-level symbology and data.

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