



ABOUT THE FIRM

A global financial services firm with more than \$2 trillion in assets under management that operates in the wealth and asset management, investment banking, and commercial banking industries.



THE CHALLENGE

- Improve quality of content and analytics
- Expand portfolio analysis capabilities
- Streamline advisors' daily workflows



THE SOLUTION

- Integrate FactSet content into internal portal
- Access robust market data on the go
- Consolidate systems into a single platform



THE RESULTS

- Enriched internal platform with relevant data and analytics
- Increased advisor efficiency and productivity
- Addressed diverse needs and workflows across the enterprise

Global Wealth Firm Increases Advisor Productivity with FactSet's Content, Analytics, and Flexible Technology Solutions

Integrating FactSet data and analytics into the firm's internal portal and deploying workstations addressed their diverse needs and workflows.

THE CHALLENGE

The chief technology officer at the wealth management division of a leading global financial services firm wanted to enhance the internal wealth portal used by the firm's 10,000+ employees.

At that time, the firm's advisors were relying on a legacy market data platform that users repeatedly described as too confusing and cumbersome to navigate. In response, the objective was to expand and improve the quality of content and analytics within its internal portal to provide a sophisticated solution for analyzing portfolios, researching securities, and monitoring markets.

The firm also desired a robust market data platform that would meet the advisors' market data, research, and analysis needs while supporting their daily workflows.

Integration took less than a day with FactSet web components communicating seamlessly with the firm's intranet displays.

THE SOLUTION

The firm discovered that it could access FactSet's unique content and dynamic reports in the form of individual web components, which fit into their internal wealth portal alongside its portfolio management and trading applications for an optimal user experience.

During the evaluation process, the firm's development team was impressed with the ability to integrate individual web components into their intranet, which ultimately streamlined their daily workflows and improved overall user satisfaction. It required less than a day's work to develop a fully functional proof of concept (POC) with FactSet web components communicating seamlessly with the firm's native intranet displays.

Following the POC, the development team completed the integration of additional web components including company tear sheets, market overviews, news summaries, charts, and quotes into the firm's internal wealth portal. These dynamic, interactive reports provided access to actionable insights without users having to navigate to other applications.

While this solution addressed the content and functionality requirements of the firm's broader employee base, 2,000+ advisors needed a more advanced and comprehensive market data solution. These advisors were licensed for FactSet's web-based Workstation, giving them access to FactSet's robust market data platform from any device with a browser. FactSet's breadth of content and analytics across all major asset classes and security types was particularly important for advisors, especially unique content such as FactSet's global geographic revenue exposures, StreetAccount news, and fund and ETF analytics. In addition, FactSet's integration of the firm's internal model portfolios and recommended lists were well-received.

Above all, users found the tab-oriented web platform intuitive to navigate, often citing FactSet's powerful search utility which empowered advisors to effortlessly locate and access the content and functionality they needed.

THE RESULTS

The integration of FactSet's web components into its internal wealth portal allowed the firm to deliver superior content and functionality to its global userbase while outsourcing the data management and application development to FactSet. This minimized both development and implementation costs and reduced time to market.

Through the deployment of FactSet's web-based Workstation to the firm's 2,000+ advisors, the firm saw a substantial increase in platform discoverability and adoption, driven by an intuitive web-based interface coupled with FactSet's interactive search utility.

Following the successful implementation of FactSet's web components and deployment of the FactSet Workstation, the firm began exploring the use of FactSet's digital solutions to create a personalized and engaging client online experience for its high and ultra-high net worth and mass affluent clientele.

The opportunity to improve client communication and engagement by providing a consistent user experience between advisors and their clients was the next priority for the firm. The technology and digital strategy teams recently discovered that with an open and flexible suite of digital solutions, FactSet is well positioned to assist with this strategic objective.

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 Views

Receive reports from the Workstation that can be embedded into your platform of choice.

[GET STARTED](#)

Wealth Management Firms

Equip your advisors with professional, personalized results that help them retain and win clients.

[GET STARTED](#)