
S&P Global

Market Intelligence

CASE STUDY

Flexible Data Delivery Helps a Global Professional Services Firm Standardize and Enhance Its Analytics

THE CLIENT:

A large, global professional services firm with extensive consulting capabilities

USERS:

A global advisory team

The advisory team at this large global professional services firm undertakes a wide range of activities to help clients make effective corporate strategy decisions for their organization's digital transformation goals. Team members are active users of the S&P Capital IQ platform supporting M&A, capital allocation, restructuring, and business integration strategies. They valued the extensive financial data that is available on the platform and wanted to harness these insights to drive a host of internal applications that had been developed for deeper analysis.



Pain Points

Team members around the world would conduct assessments that sometimes varied slightly depending on which data inputs were used in internal analytical tools, such as valuation models. They wanted to standardize methodologies so results were consistent across geographies. In addition, they were looking to leverage third-party visualization tools that could help uncover trends, outliers, and patterns in data. They met with S&P Global Market Intelligence (“Market Intelligence”) to discuss ways to efficiently integrate S&P Capital IQ data with their internal enterprise-wide business applications to efficiently gain deeper insights from the data.

The global advisory team wanted efficient delivery of a wide array of financial information that could be integrated with internal applications to standardize approaches across the enterprise and uncover deeper insights.



The Solution

The financial data on the S&P Capital IQ platform includes 5,000+ individual items and specific metrics for 17 industries. These are adjusted for nonrecurring charges to enhance cross-company comparability and can be easily linked to the source documents. Point-in-time data, which is stamped with the date of the company filing or press release, helps users avoid look-ahead or look-behind biases and perform more reliable multiples and valuation analyses. Additional information covers over one million key developments on 207,000+ companies worldwide, with 2,000+ new items added daily.

Market Intelligence discussed how the team could leverage its API solutions to support fast, on-demand access to this information. This would provide the ability to:

- Pick and choose the data needed without hosting a database.
- Generate custom files for a unique portfolio of company or security identifiers and data metrics using delimited flat files, which can be imported into any application of choice.
- Integrate this data with internal systems, portals, and business applications for ready access for benchmarking, company valuations, comps, assessments of capital structures, and more.
- Automate and standardize workflows across regions to have a common set of results.
- Develop new applications using Java or .NET libraries that utilize secure web services to dynamically access Market Intelligence datasets.
- Streamline the analytical process using API Drive, an FTP-based delivery mechanism.
- Leverage third-party visualization tools and other capabilities to gain greater insights.



Key Benefits

The team felt the API solution would enable them to gain control of the data and provide many benefits, including:

- **Access to a wide range of essential data** to drive heavily-used applications leveraged in client engagements.
- **Enhanced efficiencies** with data being automatically refreshed when new releases become available.
- **Secure machine-to-machine transfers** utilizing the latest encryption techniques and requiring fewer resources than traditional data feeds.
- **Linkages to robust visualization tools** to better understand and interpret the data.
- **A set of standardized enterprise-wide applications** using the same data to create a consistent user experience and similar results for the firm's clients, regardless of where team members were located.
- **A feeling of confidence** knowing that the data goes through a robust series of quality checks to provide a strong foundation for analysis.

Click here to learn more about how we help professional services firms and companies of all sizes optimize enterprise-wide systems.

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Market Intelligence

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