

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.

S&P Global

Market Intelligence

Contact Us

Asia-Pacific

+852-2533-3565

Europe, Middle East & Africa

+44-207-176-1234

The Americas

+1 877 863 1306

Copyright © 2020 by S&P Global Market Intelligence, a division of S&P Global Inc. All rights reserved.

These materials have been prepared solely for information purposes based upon information generally available to the public and from sources believed to be reliable. No content (including index data, ratings, credit-related analyses and data, research, model, software or other application or output therefrom) or any part thereof (Content) may be modified, reverse engineered, reproduced or distributed in any form by any means, or stored in a database or retrieval system, without the prior written permission of S&P Global Market Intelligence or its affiliates (collectively, S&P Global). The Content shall not be used for any unlawful or unauthorized purposes. S&P Global and any third-party providers, (collectively S&P Global Parties) do not guarantee the accuracy, completeness, timeliness or availability of the Content. S&P Global Parties are not responsible for any errors or omissions, regardless of the cause, for the results obtained from the use of the Content. THE CONTENT IS PROVIDED ON “AS IS” BASIS. S&P GLOBAL PARTIES DISCLAIM ANY AND ALL EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE OR USE, FREEDOM FROM BUGS, SOFTWARE ERRORS OR DEFECTS, THAT THE CONTENT’S FUNCTIONING WILL BE UNINTERRUPTED OR THAT THE CONTENT WILL OPERATE WITH ANY SOFTWARE OR HARDWARE CONFIGURATION. In no event shall S&P Global Parties be liable to any party for any direct, indirect, incidental, exemplary, compensatory, punitive, special or consequential damages, costs, expenses, legal fees, or losses (including, without limitation, lost income or lost profits and opportunity costs or losses caused by negligence) in connection with any use of the Content even if advised of the possibility of such damages.

S&P Global Market Intelligence’s opinions, quotes and credit-related and other analyses are statements of opinion as of the date they are expressed and not statements of fact or recommendations to purchase, hold, or sell any securities or to make any investment decisions, and do not address the suitability of any security. S&P Global Market Intelligence may provide index data. Direct investment in an index is not possible. Exposure to an asset class represented by an index is available through investable instruments based on that index. S&P Global Market Intelligence assumes no obligation to update the Content following publication in any form or format. The Content should not be relied on and is not a substitute for the skill, judgment and experience of the user, its management, employees, advisors and/or clients when making investment and other business decisions. S&P Global keeps certain activities of its divisions separate from each other in order to preserve the independence and objectivity of their respective activities. As a result, certain divisions of S&P Global may have information that is not available to other S&P Global divisions. S&P Global has established policies and procedures to maintain the confidentiality of certain non-public information received in connection with each analytical process.

S&P Global may receive compensation for its ratings and certain analyses, normally from issuers or underwriters of securities or from obligors. S&P Global reserves the right to disseminate its opinions and analyses. S&P Global’s public ratings and analyses are made available on its Web sites, www.standardandpoors.com (free of charge) and www.ratingsdirect.com (subscription), and may be distributed through other means, including via S&P Global publications and third-party redistributors. Additional information about our ratings fees is available at www.standardandpoors.com/usratingsfees.