

## **CASE STUDY**

# **Supporting the Strategic Planning Process for a Large Corporation**

### **THE CLIENT:**

A global design and manufacturing services company

### **USERS:**

Strategic planning group

This large design and manufacturing services company works with a wide variety of customers across multiple industries around the world. These customers range from well-established household brands to innovative start-ups, each looking to work with a known supplier that can also provide insights on technological advances and supply chain management issues. The strategic planning group at the company is tasked with having a good understanding of the many markets being served, emerging trends, the evolving needs of customers, and competitive dynamics. These insights help the company identify potential high-growth opportunities, determine how best to allocate capital, and establish appropriate revenue and profitability targets for each of the divisions.



## Pain Points

To meet the many daily demands, the strategic planning group wanted to have ready access to detailed financial information on a broad universe of firms, plus robust analytical tools to easily screen and evaluate the data and be alerted about major changes. This would enable team members to:

- **Identify growth trends** across the industries being served.
- **Assess the firm's competitive position** relative to other players in the marketplace.
- **Establish annual growth and profitability targets** for its divisions after evaluating the financial performance of competitors.
- **Test operating assumptions** to see if enterprise-wide financial targets are reasonable given overall industry performance.
- **Put in place an early-warning system** to monitor changes with customers and competitors.

The strategic planning group evaluated the S&P Capital IQ platform and felt this S&P Global Market Intelligence solution would address these needs.

**The strategic planning group wanted data and tools to better understand the many markets being served, emerging trends, the evolving needs of customers, and competitive dynamics.**



## The Solution

The web-based S&P Capital IQ platform offers a powerful array of financial and macroeconomic data, analytics, and research, enabling users to:



### Perform deep company and industry analysis

Users can easily analyze a company's performance with financials that offer 5,000+ individual data items, including industry-specific metrics on 17 industries.<sup>1</sup> The financials are adjusted for nonrecurring charges to enhance cross-company comparability and are auditable down to the source documents.



### Monitor companies and markets

Targeted email alerts for news and transactions affecting a given industry or list of companies keep users abreast of important developments. This is complemented with quick overviews on companies of interest, including events, transcripts, and updates on financial performance.



### Establish sound growth targets

Screening on a vast combination of financial, qualitative, and event-driven criteria, such as management changes, helps users assess the performance of peer groups. This provides a starting point for determining reasonable annual targets for revenue growth and profitability for each of the company's divisions and product lines.

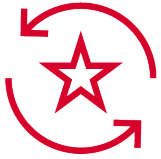


### Build and maintain models and presentations

An Excel Plug-in enables users to quickly import financial, market, and company data for analysis and model building. Developing presentations is also streamlined with a productivity suite for Microsoft Office® that links Excel data to PowerPoint® to support data consistency within presentations.

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<sup>1</sup>Data as of April 2020.



## Key Benefits

The S&P Capital IQ platform provides the strategic planning group with the information and tools needed to stay on top of the many markets being served and the actions of competitors. In particular, users are benefiting from:

- **Enhanced productivity** with access to a single integrated source of data, analytics, and research.
- **Trusted data** that goes through multiple human and machine-based checks to help deliver the most reliable information possible.
- **Apples-to-apples cross-company comparisons** based on a unique standardization process for financials, with all adjustments being fully transparent.
- **Competitive and market-moving insights** with watch lists and alerts focused on companies and industries of interest.
- **Robust tools for routine tasks** with the Excel Plug-in, screening capabilities, refreshable models, and more.
- **Training and on-going support** to understand the range of available capabilities and continue to get the most out of the platform.

*[Click here for more information on how we can support strategic planning efforts](#)*

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