

CASE STUDY

A Software Firm Sharpens Its Go-to-Market Strategy with Deep Banking Data

THE CLIENT:

An SaaS cloud banking platform

A significant portion of retail banking consumers continue to visit branches less often and use their mobile apps more frequently nearly one year after the COVID-19 pandemic began.¹ Many anticipate continuing their new behaviors well after the pandemic ends.

USERS:

The sales team

The trend is good news for this global provider of digital financial services that helps banks rapidly deploy a wide range of online banking services – from opening accounts to applying for new products to conducting day-to-day activities. With a highly active market, however, members of the company’s sales teams needed to hone their prospecting efforts to zero in on the most attractive prospects in their regions. This called for access to more comprehensive banking data for both public and private institutions to better understand industry dynamics to craft effective targeting strategies.

¹ “Bank customers cementing new relationship with digital channels”, S&P Global Market Intelligence, July 13, 2021, www.spglobal.com/marketintelligence/en/news-insights/research/bank-customers-cementing-new-relationship-with-digital-channels.



Pain Points

Members of the global sales teams lacked deep, standardized data on banks that included coverage of smaller and privately held institutions. In particular, they wanted:

- **Comprehensive, reliable, and timely financial data** on both U.S. and non-U.S. banking institutions of all sizes.
- **Detailed credit quality metrics**, including information on problem loans, impairments, and provisions.
- **Summaries of relevant banking news** for different countries around the world.
- **Banking data aggregated at a country level** to assess market shares and other important metrics.
- **Robust tools** to easily screen and analyze data.
- **A desktop solution** to quickly evaluate data and narrow down the universe of banks of interest, plus a **data feed option** to integrate information with client and prospect files on the company's customer relationship management (CRM) system.
- **Cross reference capabilities** to easily link internal and external data.

Heightened competition in the global banking market has digital service providers striving to gain market share. Deep data is essential to uncover important insights to hone sales activities and target attractive prospects.

The company contacted S&P Global Market Intelligence ("Market Intelligence") to learn more about the company's offerings.



The Solution

Market Intelligence started by discussing the many features of the S&P Capital IQ Pro platform, a one-stop solution for essential intelligence. With unrivaled data, tech-forward productivity tools, news, and research, the platform would give members of the sales teams access to many of the capabilities they needed – plus more. The discussion then moved to a data feed solution and robust cross reference services to easily integrate internal and external information in Salesforce®, the company’s CRM system. The solutions would enable the company to:



Understand industry and company dynamics

Comprehensive, reliable, and timely bank financial data includes 500+ entered items and 250+ derived ratios² depending on the bank’s size and market. All items are hand-entered into a heavily vetted banking-specific template. Coverage includes listed, non-listed, operating, operating subsidiary, and acquired/historical banks:

- North America – 48,000+ (11,800+ operating)
- Europe, Middle East & Africa – 10,000+ (4,500+ operating)
- Asia-Pacific – 4,800+ (3,300+ operating)
- Latin America – 1,400+ (650+ operating)

Detailed credit quality metrics includes problem loans, stage 3 loans, impairments, and provisions.

Banking news covers early morning regional summaries of relevant articles from local and major financial papers, translated, with links to the original article. There is in-depth proprietary reporting, daily financial institutions’ newsletters, real-time scrolling news updates, and custom email alerts.

²Data as of 2020.



Track smaller opportunities

Private Company Data covers 16 million private companies around the globe, 10 million with financial statements, and 500,000+ early-stage companies supported by data from Crunchbase.³



Round out the story with deep datasets

Transcripts review data on earnings, M&A activity, company conference calls, and special calls. The data also comes in a machine-readable format with metadata tagging.

Key Developments provide information on more than 1 million developments, based on 160+ standardized topics. This includes 20,000+ news sources, such as press releases, and regulatory filings.

Ownership provides detailed historical equity ownership data on 90,000+ public and private companies, institutional investment firms, mutual funds, and insiders/individual owners.



Quickly find what is needed

A smart screener enables users to instantly find information across companies, news, documents, research, transcripts, and investor presentations. The **Document Viewer** incorporates AI-based searches to speed up the discoverability process for text-based insights across filings and transcripts.



Feed data into internal applications

A desktop solution for quick access is complemented with Xpressfeed™ that automates the download and management of Market Intelligence data. Xpressfeed enables delivery as needed in a ready-to-query relational database to link to internal applications.

³Data as of July 2021.

**Easily manage
integration with
internal data**

Business Entity Cross Reference Service (BECRS) provides immediate linking capabilities for millions of public and private entities, using standardized and proprietary identifiers. BECRS supports timely and reliable data mapping to systematically update and maintain multifaceted relationships within a corporate hierarchy.

**Quickly identify
contacts**

Professionals data provides 3.2 million+ profiles, including biographies, contact data, education, compensation, affiliations, and corporate board memberships, each linked to a person ID.



Key Benefits

Members of the sales team saw that the rich Market Intelligence offering would give them a strong advantage as they devised their go-to-market strategies. They subscribed to all the components, seeing great value in having access to:

- **Extensive bank-specific information for both public and private institutions** to gain important insights on the location, ownership structure, and financial strength of prospects.
- **Aggregated data at a country level** to assess penetration rates to support resource allocation strategies.
- **A powerful desktop platform and screening capability** to quickly review the universe of possibilities and zero in on specific banks for further analysis.
- **An efficient data feed solution along with thousands of identifiers** to easily combine and connect Market Intelligence and internal data within concise business profiles on Salesforce.
- **The ability to quickly contact bank executives** with background details on key professionals.

[**Click here to explore some of the datasets mentioned in this case study.**](#)

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