

# A Law Firm Harnesses Data to Drive a Powerful Business Intelligence Dashboard

## **THE CLIENT:**

A large U.S.-based law firm

## **USERS:**

Client value and innovation team within the research division

Many firms have come to realize the power of business intelligence data and are looking to establish data management best practices across their organizations. By creating one comprehensive source of information that can be used by multiple teams for multiple purposes and powered with reliable, high-quality data, companies can uncover new leads, assess competitive advantages, identify business risks and more.

Members of the client value and innovation team within the research division at a large U.S.-based law firm wanted to gather intelligence to better understand existing advisory relationships and support detailed research on companies, industries and deals. They created an Enterprise Data Warehouse (EDW) to hold internal information from different sources. Now, they needed to complement their EDW with a host of external datasets from a trusted provider. All this information would then be used to drive a state-of-the-art dashboard to help identify business development opportunities, improve internal efficiencies and enhance client satisfaction levels.



## Pain Points

Members of the client value and innovation team had developed a series of intricate systems and processes to marry internal data from multiple sources before housing it in the EDW. They needed to identify a third-party provider that had:

- **The technical expertise** to understand these systems and processes and how data needed to be delivered to the EDW.
- **A sophisticated data delivery system** to create an initial load and efficiently keep information up to date.
- **Extensive data on companies, industries and more** to be categorized and linked for use in the business intelligence dashboard.
- **Clear definitions and deep knowledge of the data** to provide guidance on the most useful data points given the dashboard's objectives.
- **A collaborative working style** to help chart the best path forward, plus ongoing support and training.

The team reached out to S&P Global Market Intelligence ("Market Intelligence") to learn more about available data and delivery options.

## The Solution

Specialists from Market Intelligence discussed the firm's unrivaled datasets, sophisticated delivery systems and top-notch support that would give the client value and innovation team:

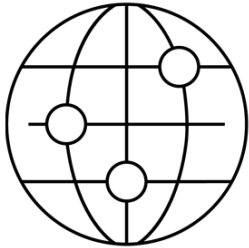


### **Access to detailed financial information**

**S&P Capital IQ Financials** provides all instances of standardized financial data on an annual, quarterly, semi-annual, last twelve month and year-to-date basis.

- Point-in-time representations of a financial period include press releases, original filings and all restatements.
- Historical annual and interim data goes back as far as 1985 for certain datasets and geographies, with significant coverage from 1993.
- 5,000+ financial, supplemental and industry-specific data items for 150,000+ companies globally, including 95,000+ active and inactive companies across multiple industries.

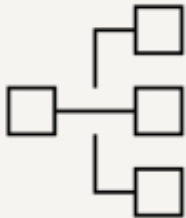
Firms are putting business-critical information at their fingertips to help make better decisions and stay well informed in today's highly dynamic environment.



**Insights on transactions taking place across the globe**

**Transactions** provides profiles of approximately two million transactions captured across the globe, including:

- M&A, private placement, venture capital, PIPE, spin-off, bankruptcies, share buyback programs and equity/debt public offerings.
- Transaction synopses that describe deal size, company participants, advisor coverage and associated filings.
- Global coverage with up to 10 years of history.



**An understanding of industry classifications**

**GICS® Direct** is a joint product of S&P Global and MSCI used to construct indices that includes current classification for active companies in 120+ countries and provides 47,000+ company classifications, covering 61,000+ global securities.

**GICS historical databases** are available as an add-on to provide historical company-level global industry classification codes. There are active and inactive classifications for 88,000+ companies across 135+ countries, with history available from 1985 forward.



**The ability to easily link different data**

**The Business Entity Cross Reference Service (BE CRS)**

provides immediate cross-reference capabilities for millions of public and private entities using standardized and proprietary identifiers. It delivers timely and accurate data mapping to systematically update and maintain the multifaceted relationships within a corporate hierarchy, avoiding the time consuming and costly endeavor of manually maintaining linkages for mapping entities to issuers. This dataset includes:

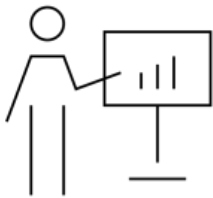
- Global tax IDs, VAT and registration IDs.
- Rating IDs from S&P Global, Moody's and Fitch.
- D&B Duns IDs, Legal Entity Identifiers (LEIs) and Markit Red Codes.
- Internal Entity IDs: GVkey and SNL Institutional IDs.
- Ultimate parent IDs for companies with greater than 50% ownership.

- Domicile codes for headquarters and country of registration.



**An efficient data delivery system**

**Xpressfeed™**, S&P Global's powerful data feed management solution, delivers data directly into a client's workflow to power internal applications. It provides a single integrated data source in item-level transaction files. Data is delivered in packages that are zipped and posted to a secure location accessible via FTP or Xpressfeed Web Service enabling users to customize and receive only the data needed.



**The benefit of ongoing training and support**

**Xpressfeed specialists** who are knowledgeable about Market Intelligence's datasets and delivery methods are available to discuss a client's objectives and help map out the best solutions and path forward.

## Key Benefits

Members of the client value and innovation team decided that Market Intelligence's solutions would provide the data, delivery and support needed for the dashboard initiative to be successful. They worked closely with their account team to choose the most useful and poignant data for analysis, link related information using GICS and BECRS and set-up seamless delivery. They are now benefitting from having:

- **Easy access to powerful datasets, linking and data delivery capabilities** that are flexible and customizable to obtain the information they need, when they need it.
- **A clear understanding of each data item**, what it represents and how it should be used in conjunction with other information to deliver actionable insights.
- **Business-critical details in the dashboard to support bottom-line growth that covers:**
  - Industry developments.
  - A company's performance in terms of revenue growth, net income and margin.
  - Industry and company peer group performance.
  - Transactions and how deal size has been changing over time.
  - ...and much more.

**[Explore the S&P Global Marketplace](#) to learn more about the capabilities mentioned in this Case Study.**

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