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## CASE STUDY: FINANCIAL DATA PROCESSING FIRM RELATIONSHIP TO PARTNERSHIP WITH MARKET INTEL



### ABOUT THE CLIENT

The client is a BPO (Business Process Outsourcing) and ASP (Application Service Provision) transfer agency that serves a wide range of global clients. As a leading provider of investor record-keeping and transfer agency solutions, the company supports over 39 million accounts for over 370 organizations and with over 6,500 experienced staff based in five locations.

### Opportunity: Enhance client relationships

Working with the world's largest banks and mutual fund companies, the client was well aware of the importance of market intelligence in identifying business development opportunities and supporting exceptional client service. The company wanted to elevate its relationships from traditional "seller/vendor" to ones of partnership.

This would involve a range of enhancements—from developing a deeper understanding of what's going on in its clients' businesses to adding to what the firm talks about with its clients. The company believed it could raise the bar with a deeper investment in market intelligence.

### Solution: Gain insight into clients' business

The client realized it needed a research and intelligence provider that could deliver a consistent, efficient and cost-effective flow of market intelligence. Through a rigorous discovery process involving the client experience team, sales team and business intelligence analyst, a plan was mapped out. It defined needs, analysis guidelines and the best options for disseminating the information to ensure delivery of timely, actionable intelligence.

Based on the firm's unique requirements, a dedicated intelligence analyst was assigned to track these key areas and report on them on a semiweekly basis. These reports are distributed via several channels, including a centralized platform.

### Result: Strategic partnerships formed

The company's expanded and improved intelligence platform enabled them to move from a practice of reacting to client feedback to anticipating client needs. The enhanced intelligence capabilities also catalyzed a cultural shift at the company. As team members gained a greater insight into their clients' businesses, they began to engage with those clients on a new footing—as strategic partners seeking to help create value, rather than vendors selling a service. And more substantive conversations with clients were just the beginning. The client also discovered openings to establish thought leadership and find new opportunities to evolve as an organization.