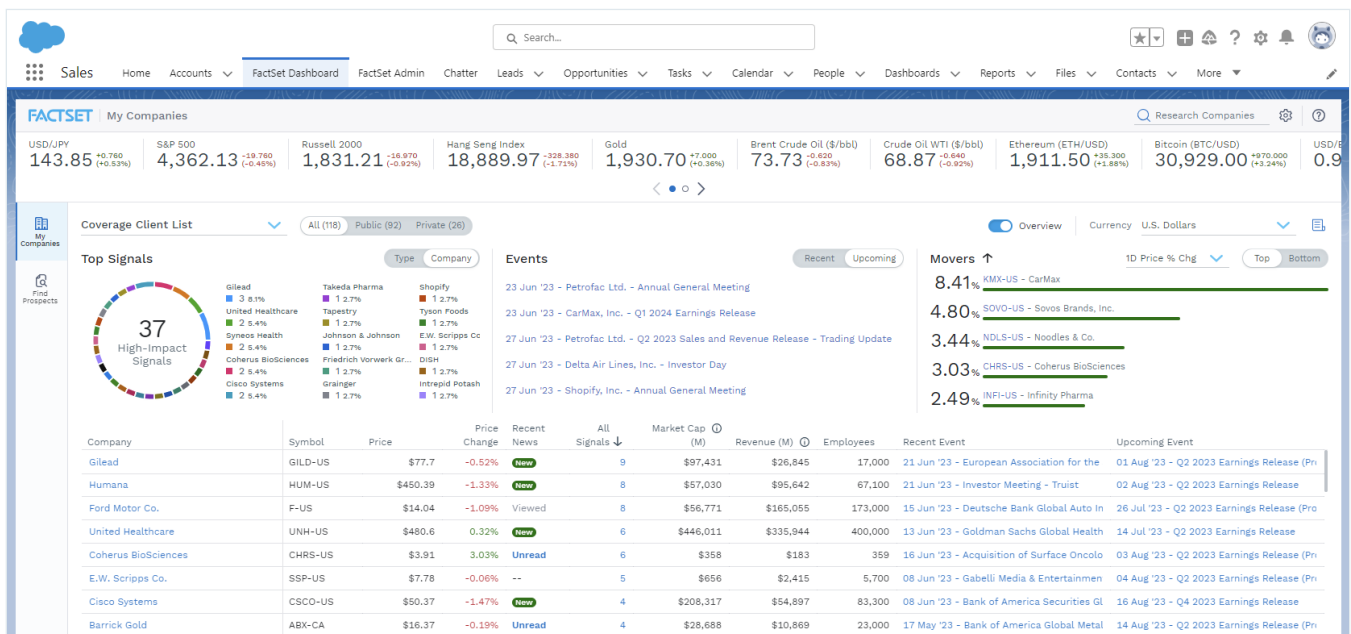


# CRM Solutions

Get more value out of your CRM platform and enhance adoption by integrating FactSet's unique company content, entity linking, and flexible data delivery methods into your CRM.



## MONITOR YOUR CLIENTS' BUSINESS DEALINGS IN A COMPREHENSIVE DASHBOARD

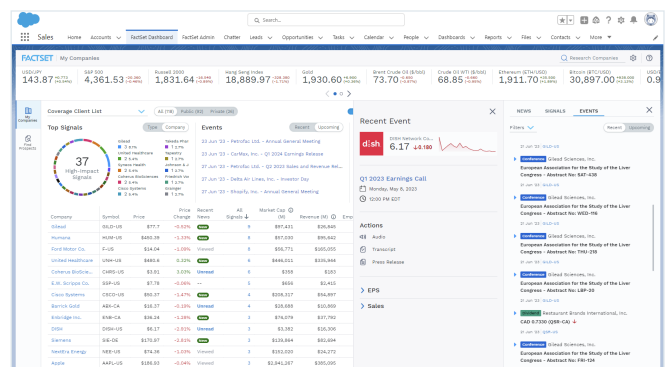
Examine your clients' business, analyze data, and identify key insights using FactSet's extensive private and public company data in a comprehensive dashboard that your entire team has access to.

- Gain additional context on your clients by analyzing company-specific reports and data alongside client account records
- Stay up-to-date on events that are relevant to your clients and quickly identify the next best action with alerts from FactSet Signals
- Uncover insights from news stories and events related to your clients' specific industries

## ESTABLISH OPPORTUNITIES FOR NEW BUSINESS WITH PROSPECTING TOOLS

Search across FactSet's company database to discover prospects to engage with and transform into new clients.

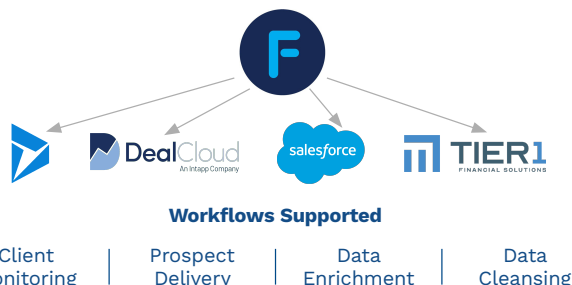
- Identify opportunities with FactSet's screening tool to research new prospects and leads that meet your criteria
- Streamline your research process by saving searches of companies for future assessment



## BENEFIT FROM CONNECTED DATA

Strengthen your CRM with connected data using FactSet's market-leading entity data model that links disparate datasets to elevate client engagement.

- Activate a consistent and reliable data solution across your firm by integrating additional plug-ins, APIs, and data feeds
- Connect your client accounts to FactSet data to conduct robust research and analysis on markets
- Provide a richer CRM experience by saving relevant firmographic information and key market data across clients



## ENSURE ACCURACY AND CONSISTENCY USING DATA CLEANSING TOOLS

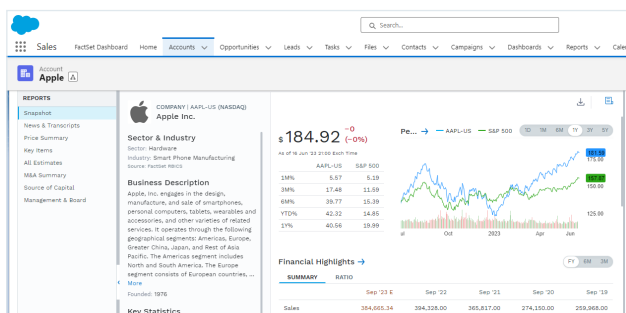
Power your CRM workflow with FactSet's automated data cleansing and concordance processes.

- Increase your confidence in the accuracy of your CRM data by using FactSet's extensive entity hierarchy data to ensure correct data linkages across subsidiaries and parent companies
- Remove duplicate data, eliminate stale content, and connect your client records to FactSet identifiers for consolidated, precise insight into your clients
- Customize the frequency of entity linking to FactSet identifiers based on the complexity of your CRM database

## ENRICH YOUR CRM RECORDS WITH TRUSTED, COMPREHENSIVE DATA COVERAGE

Capitalize on unique FactSet offerings to generate in-context analysis and insight that will increase efficiency and empower your team.

- View detailed descriptions, classifications, and financials for more than six million companies
- Access current contact information, education and employment profiles, and board membership details
- Gain a thorough perspective on supply chain relationships and take advantage of FactSet's diverse coverage of company operations, hierarchies, trade names, and multi-sector competitors
- Enhance pipeline visibility and take your workflow to the next level by providing your sales force with FactSet's industry-leading company data, market research, people, and contact details



## FACTSET CONTENT



Entity Structure



Financials & Ratios



Firmographics



Transactions



Private Equity & Venture Capital



People



Supply Chain/Relationships



StreetAccount News



Corporate Governance/Activism



Events & Transcripts



Debt Capital Structure



FactSet Signals