

Case Study

Library Information Services for a Global Financial Services Organization



Challenge

- The investment banking division of a large, global financial services firm needed to regularly gather company and industry news and financial information to enable them to create differentiated and compelling pitches
- This need was currently being met with onsite research teams in London, New York, Hong Kong and Singapore. Teams accessed more than 20 different databases to locate, package and deliver information to investment bankers
- As an alternative to having large teams onshore, the bank sought a more cost-effective solution that would leverage offshore resources for routine requests and allow a smaller onshore team to focus on only the team's



Solution

- After a formal RFP process, Integreon was selected based on our extensive experience providing research services to financial institutions. Integreon understood the critical role research played in the pitch process
- Integreon initially assembled an dedicate 15 member team of experienced researchers in a dedicated delivery center in Mumbai. The center initially provided 14 hours x 5 days support for New York and London
- To ensure a smooth and efficient transfer of responsibility, Integreon and the client worked very closely from the outset to standardize processes, train the research team and communicate changes within the client organization



Impact

- The solution has been highly effective for the client, enabling their bankers to deliver **compelling, differentiated pitches at a cost savings of 25% annually**
- Over the course of three years the client has **expanded the engagement** with Integreon, moving to a **36 person team and 24 x 7 coverage for NY, EMEA and APAC, increasing the number of departments with access** to the service and **expanding the breadth of support** to include more complex research requests
- The Integreon team now fields the majority of the client's research inquiries and has **freed onshore team members** to focus on only the most complex, highest stakes requests