

Case study

Streamlined research pricing and contracting process for a bank, plugging revenue leakage of around \$7M and reducing turnaround time for client queries by 70%

Background



- A global investment bank required an integrated framework to manage research client relationships, price negotiations and usage-based invoices under the European Union's Markets in Financial Instruments Directive (MiFID II)
- The legacy process lacked transparency and coordination in consumption tracking and reporting as well as stakeholder coordination, affecting pricing transparency and efficiency

Client impact



- Helped plug revenue leakage of around \$7 million collectively in all client categories
- Improved operational responsiveness by reducing turnaround time to resolve pricing and entitlement queries by 70%
- Enabled real-time visibility into research consumption trends through custom dashboards, leading to increased accuracy and efficiency in contracting and invoicing
- Helped improve targeting of content distribution, amplify engagement, and reduce time and focus on research with low consumption

Our solution



- Took end-to-end ownership of research account management, covering contract implementation, client engagement, consumption tracking and handling pricing queries
- Strengthened client relationships by addressing pricing, entitlement and invoicing queries with a clear and transparent approach
- Developed a suite of custom dashboards to support pricing transparency using advanced Excel, Python and Tableau analytics, which helped compare consumption vs. payment trends, record broker votes, predict research revenue, and maintain a finance ledger to monitor payments and outstanding invoices. This eventually led to impactful discussions with stakeholders.
- Provided in-depth visibility into client research behaviour, including analyst preference, sectors and content consumption trends.
- Coordinated effectively across research analysts, technology, operations, finance, legal and sales teams to drive process excellence and align pricing with value delivery
- Identified and corrected multiple data discrepancies in touchpoints related to analyst interactions and corporate access, including mismatches, missing usage details, rejected interactions and incorrect categorisation

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