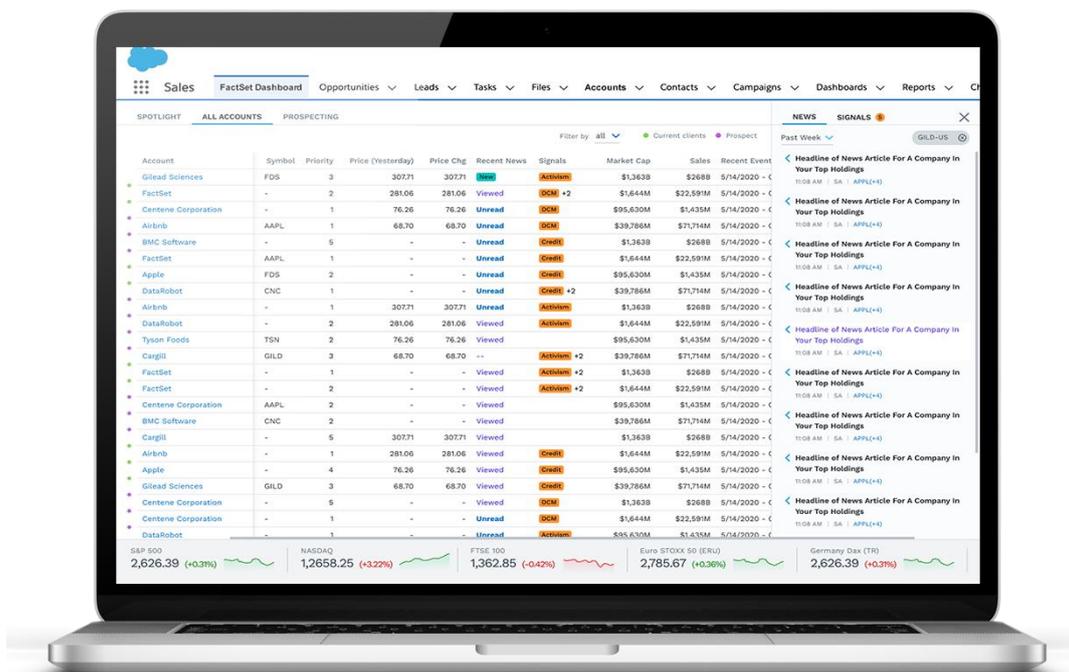**FACTSET** 〉 **SEE THE ADVANTAGE**

CRM Solutions: Integrate FactSet's Powerful Content and Functionality Seamlessly into Your CRM

Get more value out of your CRM platform using FactSet's unique content, entity linking, and flexible data delivery methods.

TRUST A PARTNER WHO UNDERSTANDS YOUR SALES CHALLENGES

Augment your CRM with solutions that will help keep you on top of your clients and identify new opportunities. From turnkey managed applications to customized data feed solutions, benefit from content delivered to you in your CRM environment in a way that makes sense for you and your CRM users. Reinforce your CRM as the source of truth when it comes to your client relationships, taking advantage of FactSet's integration into Salesforce and Microsoft Dynamics.

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 on over four million industry professionals. 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.

MAXIMIZE YOUR WORKFLOW WITH RELIABLE DATA INTEGRATION

Using FactSet's powerful CRM integration, you can benefit from the same deep content coverage as in the FactSet Workstation—without any change in quality, efficiency, or reliability—directly in your CRM. Prioritize your most important accounts with a dashboard that displays your account list alongside relevant FactSet content, recent events, StreetAccount News, and FactSet Signals. Get additional context on each customer and use that data to add value to meetings. Leverage FactSet's comprehensive company database, for example using FactSet RBICS classification system, to find new opportunities. Get a cohesive view of your customers and drive personalized experiences with standardized data that can be ingested easily and efficiently.

CLEAN DATA AND ACCELERATE LEADS WITH AUTOMATED ENTITY LINKING

Supercharge your CRM workflow with FactSet's automated data cleansing and concordance processes. Remove duplicate data, eliminate stale content, and connect your client records to FactSet identifiers for consolidated, precise insight into your customers.

Enhance pipeline visibility and provide your sales force with the best company data, market research, and people and contact details they need to take their everyday workflow to the next level. In addition, customize the frequency of entity linking based on the development size and complexity of your CRM database.

LEVERAGE FLEXIBLE AND SCALABLE DATA DELIVERY SYSTEMS

Build a more custom integration with additional plug-ins, APIs, and data feed solutions. Access up-to-date company information via interactive reports sourced directly from FactSet's flagship Workstation product. Stay on top of recent events, prepare for client meetings, and automate meeting preparation with on-demand PDF creation with a single API call, eliminating the need for manual data collection and collation efforts. Take advantage of the breadth of content offered via FactSet's standard, on-demand, and real-time data feeds to build a comprehensive solution that meets your needs.

Ensure every team on the CRM platform at your company has a reliable frame of reference and access to the same content across multiple websites, internal portals, and mobile applications.