

Case Study: Top Investment Bank (JPMorganChase)

A Case Study in Turning Discovery into a Strategic Asset

Client: JP Morgan/Chase

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Challenge/Issue:

13 lines of business, large portfolio of clients in each, similar foundational research but decentralized and disparate tools, systems, tagging methods, archives and/or repositories. Non-standardized permission/access (likely non-existent) across sales and product teams around the world. Sales and marketing teams were unable to locate research.

Solution:

Design and build a global centralized corporate and institutional research library. a comprehensive data repository for dealmakers combining public and proprietary analytics. Entailed developing User Experience as well as scalable meta-data indexing framework, collection of industry research and integration across product types, countries and credit risk analysis.

Impact:

Investment Bank Marketing Operations developed a solution to host the solution by identifying the technology platform, database framework and data search criteria. Businesses identified the historical analytics and foundation data, agreeing to metadata tags for all research and analytics. This **robust research platform** became a critical resource used across the investment bank which was globally accessible and used across product lines.