

Microsoft & LSEG Partnership Video

Transcript



LSEG

Monica is the managing director at Contoso Investment Bank, it's the start of another busy week. She receives a Workplace notification in Teams about Fabrikam, one of her largest customers. Last year she pitched VanArsdel, an M&A opportunity to Ethan the Fabrikam CFO. But with the EPS accretion predicted to take at least 36 months, he said it was a no-go. They agreed to meet again when it was achievable within 18 months. They simply set up an alert in the Workspace analytics engine to monitor when the deal becomes accretive.

A year later, it's possible. The combination of VanArsdel's recent earnings guidance and movements in the FX market means 18 months is now realistic. Before she loops in the team, she wants to provide crucial context about recent deals in Fabrikam's sector. As she's searching the Workspace bot instantly filters the deal's analysis and shares an overview of all recent deals. She loves how easily she's able to pull together such a variety of important data for her team. With the preliminary analysis ready,

Monica pulls in Sarah, the VP on her team to the Fabrikam channel. Sarah will be taking the lead on the project. As Sarah receives a message from Monica to check in on key themes coming out of research reports, a Workspace bot powered by the signal search app intervenes and presents a card detailing a time series summary of all the key themes discussed by equity analysts. Through its intelligent NLP engine, it has identified an increasing emphasis on dry powder and M&A opportunities.

The insights will be helpful in guiding the focus of the pitchbook. With all the information she needs in hand, Sarah is up to speed faster than ever. Next she turns her attention to creating the project team. The workspace bot asks some simple questions that help her set up the new team as quickly as possible. The new team is immediately presented with their retail group's critical pre-populated content on both Fabrikam and VanArsdel, making it much easier to get started on the pitchbook. What's more, the Workspace bot has pulled together the previous versions of the pitchbook and supporting files across Microsoft PowerPoint and Excel, and updated them with the latest data using the native Workspace and Office integration. All the data has flowed into Microsoft PowerPoint and Excel automatically using the Workspace one and Office integration.

After a bit of wordsmithing to reflect the new data, it's ready for review. Monica messages Ethan on the Contoso Fabrikam external channel and is excited when he agrees to meet. Ethan suggests adding their new treasurer Hollie, but this will be her first time contacting her. She initiates a search in app Workspace followed by the treasurer's name. Then messages, "Hollie looking forward to meeting you. "Keep an eye out for an invite to the Contoso Fabrikam shared channel and a meeting invite". Integration of Microsoft Teams' directory, Workspace and Messenger makes reaching out to someone new a lot easier in fewer clicks. At the beginning of the meeting, Teams automatically creates an internal group channel where the Contoso team can chat, ready to handle any tough questions or objections from the client.

Hollie is running late because of a fire drill. Fortunately, the automatic transcript ensures she can quickly catch up within seconds. The meeting is going well when suddenly Ethan raises a question about his FX exposure with the transaction. Sarah quickly catches onto the concern, jumps into Workspace and examines the FX rate and estimates. She then shares the analysis from Workspace in the internal group chat with Monica. Monica confidently shares the information and suggests that she set up a follow-up meeting between Hollie, Fabrikam's treasurer and an FX specialist to discuss how to manage the risk with a deal contingent FX forward. The Workspace bot automatically adds this as a to-do list item to the project task board, ensuring nothing is missed.

Both the CFO and treasurer are feeling confident and give Monica the thumbs up to dig further into the opportunity.