

Atlantic Management Company Uses First Research Industry Intelligence to Improve Business Valuations and Customer Relations



BACKGROUND

Atlantic Management Company is a leading valuation and financial advisory firm serving business, legal and financial communities throughout New England. Founded in 1968 and located in Portsmouth, NH, Atlantic Management has a tradition of excellence built on competence, experience and integrity and provides a broad range of services in the areas of valuations, mergers and acquisitions, Employee Stock Ownership Plans (ESOPs), Family Business Services and Capital Raising.

CHALLENGE

Atlantic Management is committed to providing the highest level of service to its customers and upholding its reputation as a trusted and competent advisor. The firm's Business Valuations group is responsible for providing credible and defensible opinions of value based on careful research and accepted valuation practices. In other words, the group is tasked with putting a value on a client company based on financial status, operations and the market in which it exists.

Atlantic Management analysts spend an enormous amount of research time in order to truly understand the overall businesses of its clients, using that research to increase the success of the initial sales call and to more accurately and efficiently value a business. It is essential that they make a good first impression with a prospective customer by understanding not only the actual business, but also the issues faced within that specific industry.

Atlantic Management needed a tool that would provide easy access to the valuable research and background information its analysts needed to intelligently court new clients. The firm needed a resource that would save them time and effort in their business development efforts while helping them gain a competitive advantage.

Brady Finney, Atlantic Management valuation analyst, identified First Research as a solution for the firm's efforts.

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SOLUTION

Finney learned that First Research provides the industry intelligence Atlantic Management needs to successfully engage prospects, uphold the firm's upstanding reputation, and provide accurate valuations to its clients. First Research Industry Profiles are created to provide the information needed to quickly learn about a target industry. And, because

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each Industry Profile is updated quarterly, Finney knew the information used to further understand prospects and clients would always be timely. He also saw the advantage of using First Research's Call Preparation Questions. These targeted questions allow his team to initiate conversations that confirm an overall understanding of a customer or prospect's business and the challenges they face.

RESULTS

Atlantic Management currently uses First Research Industry Intelligence Tools to successfully engage clients and prospects, and to effectively learn about the business they run and the challenges they face. First impressions are crucial in the valuation business, and Atlantic Management's valuation analysts can receive a quick education on an industry and easily initiate conversation with prospects by asking smart questions and proactively guiding the conversation.

Key Benefits

- Engaging clients and prospects by learning about their business and challenges.
- Making positive first impressions.
- Asking smart questions and proactively guiding conversations.
- Streamlining the valuation process.
- Impacting the bottom line.

“It is crucial that we demonstrate an understanding of our client's business and there is nothing more irritating to them than when we ask irrelevant questions,” said Finney. “Clients and prospects expect us to be knowledgeable about their business and their industry. First Research helps us ask engaging questions that fuel the content of our conversation, proving that we've done our homework and truly understand their needs.”

First Research gives Atlantic Management the ability to save valuable research time by providing the data necessary to truly understand different industries. “Our issue is time and researching multiple industries takes a lot of it,” Finney added. “First Research provides a concise, consolidated snapshot of our clients' and prospects' industries so we can relate to their current and future needs. Plus, without extensive searching, we have easy access to trade industry information that assists in the valuing process.”

First Research further enables Atlantic Management to sufficiently uphold their solid reputation as a trusted resource. “We're in the business of providing crucial financial information and advice. Having critical industry insight improves the impression we make and the image we strive to uphold, which drives our bottom-line,” Finney added.

First Research is the leading industry intelligence company that helps sales teams perform faster and smarter, open doors and close more deals.

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