



# How a financial services firm gets proprietary insights to boost client engagement

Global investment & merchant banking firm LionTree conducted DIY market research on our global panel SurveyMonkey Audience and published exclusive data-based insights in its client newsletter.



## SURVEY DATA



523 respondents took the survey



<1 day to get results

## THE CHALLENGE

### Generating exclusive insights through original research

Proprietary insights can make a big difference in the investment world.

The Public Markets team at global investment and merchant banking firm LionTree knows that a unique combination of data and analysis can increase engagement with its clients: corporate executives, institutional investors, and private equity and venture capital fund managers.

Team leader Leslie Mallon needed to generate proprietary data about consumer trends in technology, media, and telecommunications (TMT), the bank's specialty. Her goal: Providing unique insights and increasing client engagement through LionTree's weekly newsletter and social media channels.



**Leslie Mallon**  
Head of Public Markets,  
LionTree

**“We’re always looking for something unique that can provide differentiated insights. A proprietary data set certainly helps us achieve that goal.”**

–LESLIE MALLON, HEAD OF PUBLIC MARKETS

## THE ANSWER

### Using agile market research to get real-time market insights

Mallon and her team realized they could achieve their goal by conducting DIY market research.

They needed to create a survey about TMT, send it to the right target market, and analyze the results. And they needed everything to happen quickly: Their newsletter runs every week and the bank's clients expect real-time data and analysis.

Mallon landed on our global consumer panel, **SurveyMonkey Audience**, as the best solution to conduct market research quickly and effectively—even without having a survey research expert in her team.



## THE TAKEAWAY

### Original thought leadership content and stronger client relationships

The LionTree team completed the survey project using SurveyMonkey Audience's self-serve platform while consulting about survey design and launch with our Audience product experts.

**“The data collection turnaround time was unparalleled. We launched our survey in the morning and it was completed that evening.”**

**Company**  
LionTree

**Strategic goal**  
Client engagement

**Solution**  
SurveyMonkey Audience

**Success factor**  
Real-time market insights

The responses gave Mallon highly valuable insights, including answers to the question of which online service consumers were most likely to cancel if the economy were to move into a recession scenario.

The firm received significant feedback from clients on the analysis and quite a few reached out to obtain more detailed survey data. Engagement also picked up on LionTree's social media channels. And Mallon and her team discovered a new way to get an edge in a competitive market: generating proprietary data-driven insights through DIY market research.