



Search Spotlight –

How a top asset manager found its Investment Data Strategy leader

Mandate and Challenges

Our Client is a leader in active investment management with long record of excellence and a growing global presence. They recognized the need to hire an Investment Data Strategy leader as a part of ongoing efforts to enhance their research process and improve investment performance.

They needed to define a brand-new leadership position, set a recruitment strategy, and attract a diverse slate of candidates. The right candidate required broad market and alternative data knowledge, experience setting data strategy across multiple asset classes, and the leadership qualities to build consensus among senior leadership and front office investment personnel.

Solution

Together, we agreed to search for a Director of Investment Data Strategy with comprehensive responsibility for data sourcing and strategy across investment products. The individual would partner with investment leaders to understand their data needs, advise, and set both short- and long-term strategic goals. We designed a search plan which targeted two distinct candidate profiles:

- 1) Content and Data product leaders from major market data providers, and
- 2) Data Sourcing and Strategy leaders from competing fund managers.

Success

- **Diverse short list** – TLG provided a short list of 11 candidates, including 5 diversity candidates (45%), 4 candidates from major data providers including FactSet and Refinitiv, and 7 candidates from competing fund managers.
- **The data providers stood out** – each candidate from major data providers performed well (including the 2 finalists for the position), seeing multiple rounds of interviews. Diversity of client experience proved more valuable than more narrow in-house experience.
- **Successful hire** – Our Client hired their top choice, a Vice President from FactSet's Content & Technology Solutions division. He started with the Company in November 2020.



The flexibility to meet our clients' needs and the strength to deliver.