

# Masthead and FAST Apply Vision, Expertise, and Crucial Insight to Industry's Core Needs to Create Viable, End-to-End Search-Based Financial Services Offerings



**Masthead Headquarters:**  
New York, NY

**Core Business:**  
Management and systems  
integration consultancy focused  
on enterprise search solutions

**Objective:**  
Masthead and FAST work jointly  
to discover critical industry  
challenges in order to better  
target financial services business  
offerings based on the FAST®  
Enterprise Search Platform  
(FAST ESP™) and Grooper  
Enterprise Search Management  
platform.

**Key Markets:**

- Financial Services
- Communications & Technology
- Life Sciences
- Media

**Solution:**  
Customized business and  
technology solutions combine  
Masthead's strategic consulting  
and technical services offerings  
with FAST ESP.

**Benefits:**

- Visionary partnership produces  
go-to-market, end-to-end  
search solutions that enable  
customers to realize business  
value
- Industry analysis reveals clues  
to specific challenges, pains for  
financial services companies
- Masthead/FAST target financial  
services market with search-  
based solutions that meet that  
industry's core needs

## A Vision for Search

"We don't believe anyone should have to use search proactively," states Charles Sword, managing director of Masthead Consulting Corporation.

Sword is explaining the strategy behind Grooper, the recently released primary product offering for Masthead's enterprise search practice. Rather than requiring users to initiate a search manually, this rules and tagging engine associates indexed content automatically back to the point of need.

Grooper is just one of Masthead's many offerings. The broad-based systems integration consultancy provides real business solutions for clients in the financial services, life sciences, and media industries. "We have a very strong point of view about how search enables business and drives productivity in those three verticals," says Sword.

But finding a search technology company with a similar vision and the capabilities that Masthead considered necessary for delivering business value to complex enterprise challenges with search was surprisingly difficult. Only one company stood apart—FAST.

"FAST had the capabilities and the open architecture that we required," says Sword. "They were the only company that had the vision and the innovative, market-leading tools to help us provide the go-to-market, end-to-end search solutions that would enable customers to realize business value."

Masthead now has been a FAST partner since 2006, and the two companies together provide powerful enterprise search solutions that leverage search-

oriented architectures. Masthead complements FAST's search platform with deep domain experience, especially in the financial services industry.

## A Big Picture View

Communicating a vision for search to the financial community, though, has its challenges. The broad-based capabilities of search combined with a limited perception of what search can do outside of the familiar search "box" makes promoting the benefits of this quickly growing technology difficult. Masthead approached FAST with the idea that in order to penetrate the financial services market effectively with enterprise search solutions, the specific requirements of the industry first needed to be addressed.

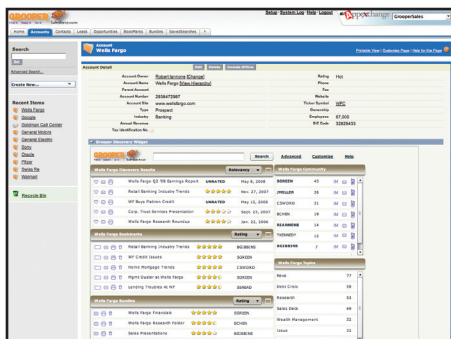
The result was a 15-month joint engagement during which Masthead conducted an in-depth industry analysis with global market leaders to determine the primary information needs and challenges in the financial services industry. The findings were eye-opening, prompting Masthead and the FAST financial services team to hone their sales approaches and tailor their joint search solutions to address some very specific, very real industry challenges.

One aspect of the findings reveals a classic challenge: situational awareness. "What we heard was that although companies have made large-scale investments, particularly in front-office and customer systems, there still are a lot of challenges in getting a full view of the customer," says Sword. "A lot of it is due to the underlying complexity of the technology footprint and the organizational structure of multiple line-of-business, multi-national companies."

There is a real opportunity for search to bring together a full customer view because of the ease with which it can integrate information universes. But before situational awareness can be addressed in the financial services market, there are significant hurdles to overcome. Security and privacy are first among them.

Within the banking industry, strict privacy and federal compliance laws have prompted companies to invest a lot of time and money in their systems to address their security and compliance challenges.

"In order to present any viable search-based extension to a financial services customer infrastructure, you really have to know how to leverage the customer's previous investment," emphasizes Sword. "The key to leveraging search in this environment is not to create yet another entitlement structure and source for search-driven content." Which brings us back to Grooper.



Grooper Discovery Dashboard

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**Reeling In the Results**

Between the new Grooper platform and the recent findings of the Masthead/FAST joint consulting engagement, Sword feels that the partnership is well-positioned to meet the specific requirements of the financial services industry with search-based solutions. "We're transitioning the dialog with prospects now to be more domain-centric, approaching the business about its core needs as opposed to going in and selling broad-based search platforms," he explains.

Sword hopes to pool this language, the vision, and the direction of both the internal FAST financial services team and Masthead to create comprehensive, viable, end-to-end financial services offerings. "As a solutions provider and integrator, we have a symbiotic relationship with the FAST field team. As FAST begins to have these conversations with prospects, we can be part of the solution as a partner."

**About Masthead**

Masthead Consulting is a management and systems integration consultancy focused on enterprise search solutions. In addition, Masthead is pleased to announce the release of Grooper, the first enterprise search management suite. Grooper provides search automation, security, and business process integration between leading enterprise applications, such as salesforce.com, and the FAST Enterprise Search Platform (FAST ESP).

**About FAST, a Microsoft Subsidiary**

FAST is the leading global provider of best-in-class enterprise search technologies for the most demanding applications. FAST's flexible and scalable enterprise search platform (FAST ESP), empowers people and businesses, allowing them to explore and assimilate vast amounts of data regardless of format. By creating unique user experiences and changing the way people interact with information, FAST technologies can uncover new revenue streams, improve business decisions, and increase productivity.

**"Fishing" for Information**

Grooper provides an elegant solution simply by leveraging existing entitlement infrastructures, such as CRM. "Search can enhance and extend every single business process and existing application within the infrastructure," says Sword. "Grooper embeds in any endpoint application, and extends that application with search."

Named for its ability to group information, Grooper is a rules and tagging engine that enables companies to write business rules for search that address not only how to group and combine results back to the interface, but also that define what information each user can see based on what business process is being performed and the user's role.

The product's tagging framework is crucial to guaranteeing relevant results and to delivering the level of precision needed in order to add value to the business processes while leveraging the existing security infrastructure. Through automated discovery, Grooper surfaces emails, presentations, research reports—any assets that are relevant to the user based on the defined business rules. The user can then select individual elements of the results, save them, and bookmark them in permanent association with a particular customer account that can be viewed—and further developed—by other users, thus building a relevant image of the customer.