

A CASE STUDY

# How a Senior Advisor Helps Win New Business

*A case team uses expertise to bolster their pitch*

## CHALLENGE

A case team preparing a proposal for new business in the registered investment advisor space sought an outside expert with deep knowledge of the financial services industry to advise their team.

## THE GLG APPROACH

The client worked with GLG to select a Network Member and former CEO at a financial services company to partner with the team. The Network Member worked with the team for 35 hours over several weeks to provide operational expertise and pulse-check their findings.

The client team used the expertise to create a pitch for a financial services client looking to break into the retail custody space.

## OUTCOME

The Network Member helped the team develop and present more impactful findings to their potential client. By including the expert's insights in their proposal, the team showcased their deep bench of expertise and won the project.

## FEATURED PRODUCTS



GLG Placements

[Learn more](#)

**A case team developed their new business proposal with a financial expert who partnered with them as a senior advisor. The team ultimately won the new project.**

## Why GLG?

### Project Breadth

One senior advisor, 35 hours of work over three weeks.

### Advisor Engagements

Clients can engage with GLG Network Members who serve as senior advisors to support project teams in a more in-depth and ongoing capacity, whether internal or external facing.

### Extension of Your Team

A senior advisor functions as an extension of a team to help win proposals, join meetings, review documents, provide feedback, and serve as a point of validation based on their expertise.

As the world's insight network, GLG connects clients to the subject-matter experts who can provide real-world insights to make informed decisions. Our team of professionals work with you to create a tailored approach that identifies, assesses, and answers your questions on your timeline. We bring the power of insight to every great professional decision.

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