Gain

Unity\

Case Study

How Unity Advisory Uses Gain's Claude Integration to Automate Its Go-to-Market Engine

Founded in 2025, Unity Advisory is a rapidly scaling professional services firm providing services across the finance function, tax and deals, with AI built into the core of how it operates. The firm helps clients strengthen processes, and operating structures, prepare and execute mergers, acquisitions, and disposals, and manage tax compliance, transactions, and strategy. It works with CFOs and leadership teams in mid-market and PE-backed organisations.

This case study is drawn from a conversation with Unity Advisory's Right Hand to the CEO, whose quotes appear throughout.

The Challenge:

Accessing Reliable Market Intelligence From Day One

Unity Advisory was built to combine deep experience, AI-powered ways of working, and an absolute focus on outcomes, pairing expert human judgement with proprietary AI workflows. Delivering on that from day one meant building a tech stack from scratch, with the strongest solutions available.

At the heart of that challenge was market intelligence. To provide clients with sound advice, Unity Advisory first needed a clear, reliable view of the market and how those clients performed against their peers.

> "In professional services, you're providing advice to clients on how they can do things better. One of the best ways to understand that is to know how the company you're advising performs against its peers, and for that, you need good-quality market intelligence data."

The Solution:

Trusted Data, Available Through Claude

With some having used Gain in previous roles, Unity Advisory already knew the platform and the team behind it well, and brought Gain into the firm's tech stack early. What they valued most was the quality of the information and the ease of use.

> "Having used Gain in my previous role, I knew they'd be a good platform to use. It's super user-friendly and easy to navigate. We ran monthly training sessions where every team would come in and get shown how to use the platform, and people picked it up straight away because it's so user-friendly."

As a scaling company itself, Unity Advisory also values that Gain is built collaboratively, taking on client feedback to develop the platform around their specific needs. Unity Advisory was part of the MCP rollout, testing the integration and helping shape it through their feedback.

> "Gain's way of working is very collaborative and they take feedback on board. That's one of the reasons we chose Gain — because they're responsive and flexible, and they understand our needs. We've been lucky enough to be featured in the Claude MCP rollout as an early adopter, and any feedback we've given has been actioned really quickly. The MCP is very powerful."

From there, Gain quickly became embedded in their day-to-day operations as an integral part of their workflows.

> "We're building out our go-to-market engine and Gain is an important cog. Its integration with our tooling, in particular Claude, has been really powerful."

Use Cases:

Leveraging Gain from Sourcing to Outreach

- Applying filters to their sweet spot to surface new business development opportunities
- Surfacing company and market insights to pinpoint where they can add value for clients and prospects
- Identifying key contacts and representatives, including email details, for targeted outreach

> “We provide services across the deal lifecycle — everything from deal readiness, due diligence, and carve-out, through to integration and post-deal value capture. Gain has very good insight into when a company has come to market, plus financial information on how they're performing, as well as people data. From that, we know who to contact and what to contact them about, because the companies come up in Gain's analysis, and we have enough information on the platform to tell them where we can be useful.”

The Results:

Automating Their Go-to-Market Engine

With in-depth information and insights available on Gain, Unity Advisory has enabled its senior professionals to quickly access research themselves, allowing the firm to maintain a lean staffing structure built around experienced professionals rather than a large junior team.

> “It frees up time for higher-value work. My background is in strategy consulting and M&A advisory. That manual research used to take hours. Now, much of it can be done faster, which fits our operating model at Unity - we run lean, so this lets the team focus where it matters. There's a real ROI on that.”

The team has also automated parts of its go-to-market engine with Gain, drawing on high-quality insights and a powerful integration to be more targeted in its business development. That strength of automation rests on the strength of the underlying data.

> "We've automated parts of our go-to-market engine. We run prompts through our LLM, it builds a deck for us automatically, and we know who to send it to and what should be in it. There's still human input, but there's real automation too, and Gain is one of the biggest parts of that, because it's the data at the start of the value chain."

This efficiency reflects the model Unity Advisory set out to build from day one. **“We built Unity Advisory from the ground, completely from scratch, to be as efficient as possible, and Gain is completely aligned with that. It allows us to operate with a lean, leveraged back office, so our client-facing people can spend their time with clients, solving problems.”**

Across sourcing, outreach, and delivery, Gain has helped Unity Advisory build the kind of firm it set out to be: efficient by design, with expertise focused where it matters most.

“The only reason not to recommend Gain is to keep it for myself.”

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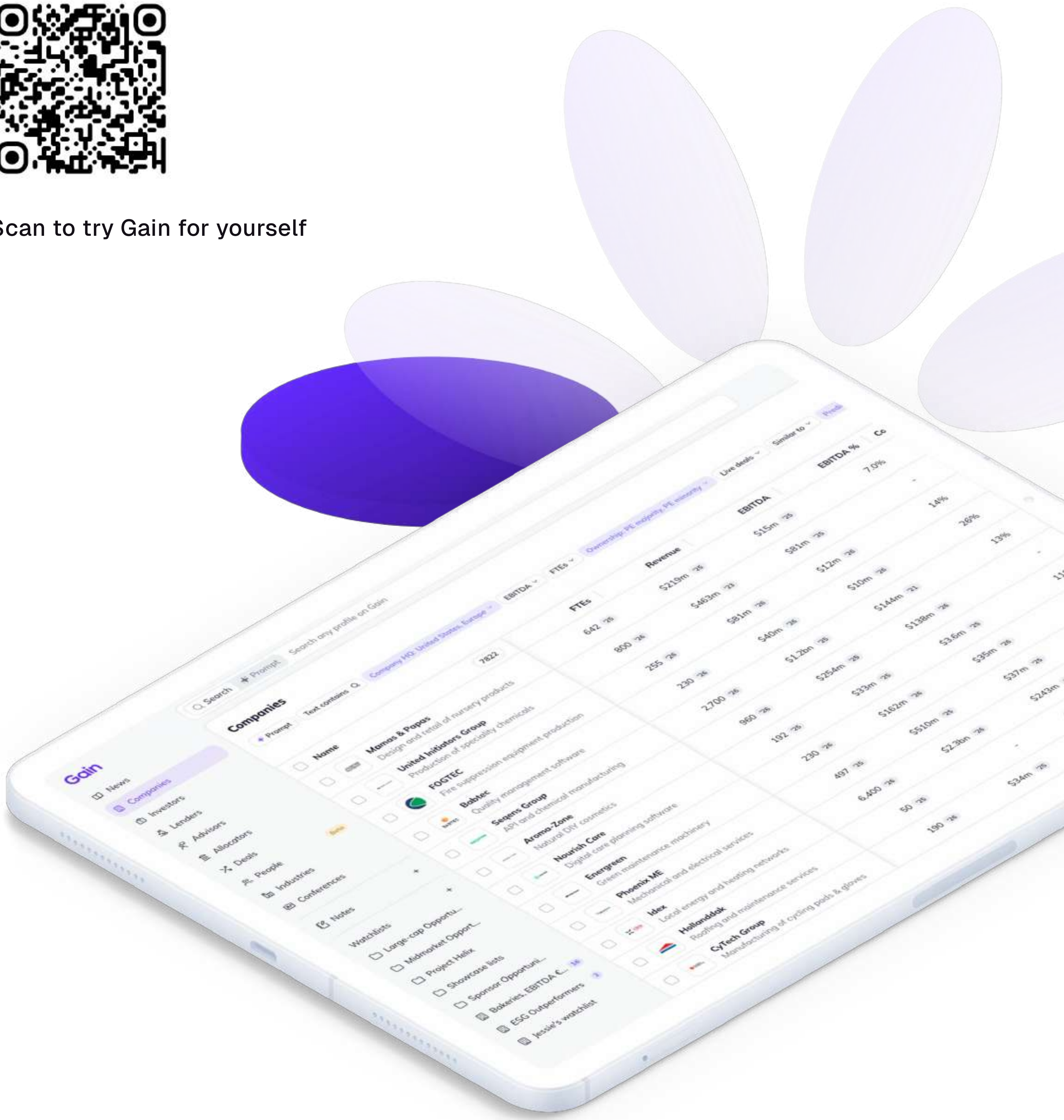

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