

Welcome!

LexisNexis atVantage Webinar

Presented By

Ed Schechter, Duane Morris

Alison Dyer, Duane Morris

Darryl Cross, LexisNexis

November 1, 2007

About Our Moderator

Darryl Cross

Director, Competitive Intelligence *LexisNexis*



- Has been with LexisNexis since 2004 and oversees strategy and training for all LexisNexis Client Development offerings.
- Darryl collects and shares best practices with hundreds of the nation's leading law firms as well as providing business analysis to help them grow.
- Former law firm Chief Marketing Officer; winner of 2003 Excellence in Marketing Award.

How Do Law Firms Grow and Become More Profitable?

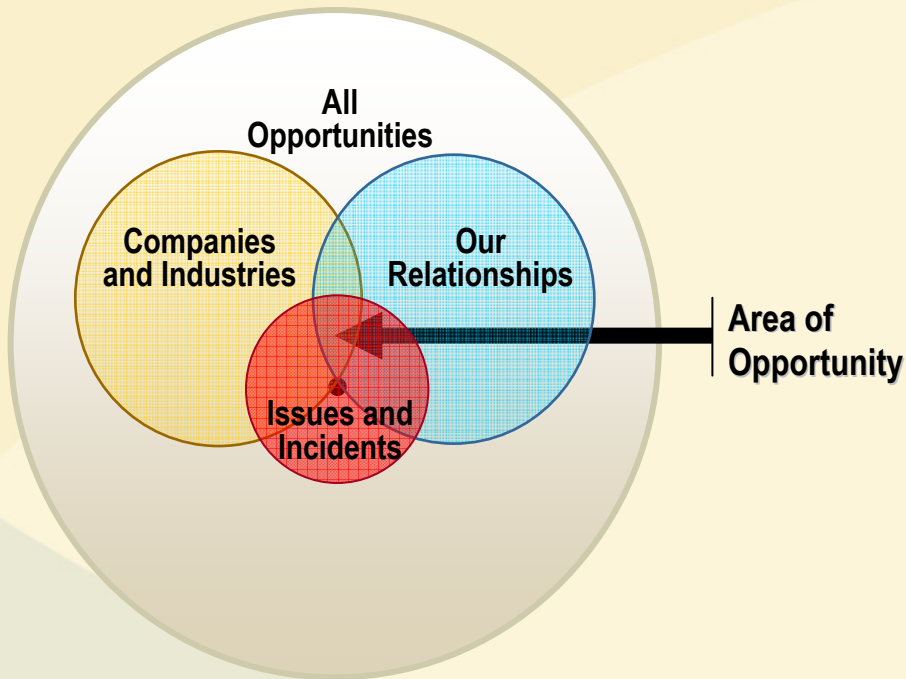


- Cross-selling and Expanding Current Clients
- Finding New Clients Through Prospecting
- Geographic Expansion (new office locations)
- Merger or Acquisition of Other Firms
- Lateral Hire (recruiting lawyers from other firms)

Challenges Facing Law Firms

- Lack of one consolidated view of clients or prospects
- Limited resources in which to effectively build brand and execute measurable results
- Inability to identify internal and external relationships that help win new business from clients and prospects
- Little or no understanding of where to focus efforts
- Lack of easy to use tools to get information to the professionals where and when they need it
- Inability to track the ROI of their current activities

The World is a Big Place



- Show me all companies we could work with
- Show me all pharma companies we could work with
- Show me all pharma companies we *have* worked with
- Show me all public pharma companies we *have* billed over \$100,000 in the last two years, attended our last M&A seminar, and then tell me who knows someone there

Professional Challenges

- I hired these CI people, now I need to make sure they make an impact
- I have limited resources—time, attention and money
- I have a limited number of people who are responsible for other high priority projects
- I need to support our existing strategy, not create new projects



Duane Morris: A Competitive Intelligence Case Study



Duane Morris

[www.duanemorris.com]

Alison H. Dyer
Edward M. Schechter
November 1, 2007

©2007 Duane Morris LLP. All Rights Reserved. Duane Morris is a registered service mark of Duane Morris LLP.

Duane Morris – *Firm and Affiliate Offices* | New York | London | Singapore | Los Angeles | Chicago | Houston | Hanoi
Philadelphia | San Diego | San Francisco | Baltimore | Boston | Washington, D.C. | Las Vegas | Atlanta | Miami | Pittsburgh
Newark | Wilmington | Princeton | Lake Tahoe | Ho Chi Minh City | Duane Morris LLP – *A Delaware limited liability partnership*



About Our Speakers



Alison H. Dyer

Business Development Analyst



Edward M. Schechter

Chief Marketing Officer



CI Case Study: Duane Morris

- Duane Morris Implementation of CI
- Critical Success Factors
- Challenges



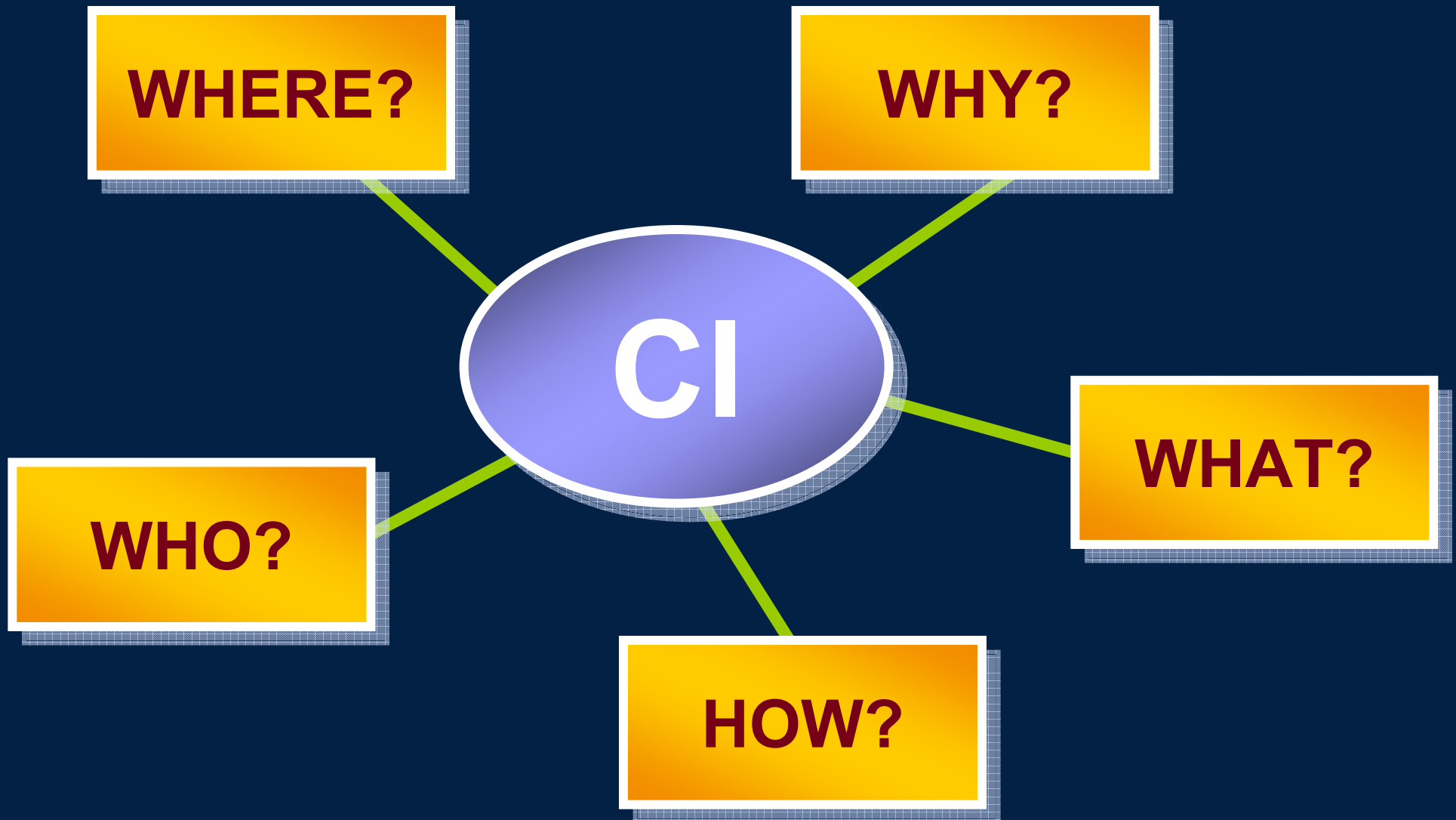
Poll Results

How many people are dedicated to a CI initiative at your firm?

- 0 = 47%
- 1-2 = 38%
- 3-4 = 6%
- 5+ = 6%



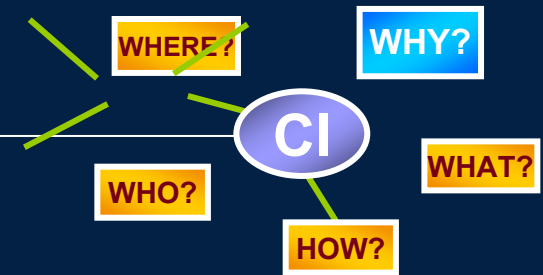
Five Critical Success Factors





Why: Objectives

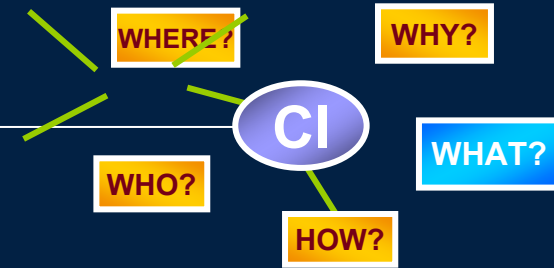
- Define CI to best suit your firm
- Create shared understanding and buy-in across functional areas
- Share ownership and solution
- Informal start, formalize over time





What: Measuring ROI

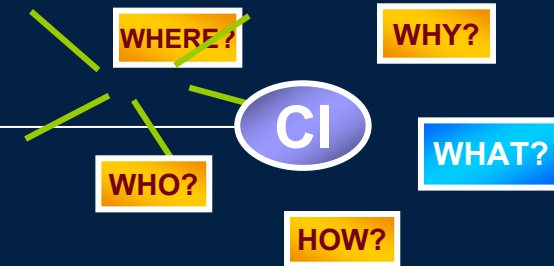
- The costs of CI and Marketing
- “ROI Report Card,” marketing evaluation
- Client Satisfaction Interviews
- Other metrics





What: Measuring ROI

Decision matrix



1. Client Relationship
2. Value of Opportunity
3. Rate Sensitivity
4. Reason for Opportunity
5. Business Development Goals
6. Marketing Intelligence
7. Turnaround Time and Available Resources
8. Competitive Assessment
9. Capability to Respond Effectively
10. Probability of Winning



Poll Results

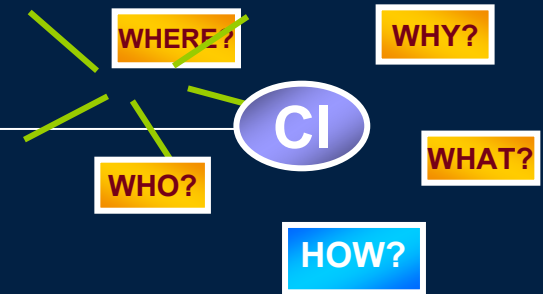
Do you evaluate business development opportunities (for existing clients or potential new ones) and marketing opportunities?

- Before = 10%
- After = 0%
- Both = 56%
- Neither = 32%



How: Building Bridges

- Business Development Analyst
- Relationship between Library and M&BD
- Passing the baton





Poll Results

Where does your CI function live?

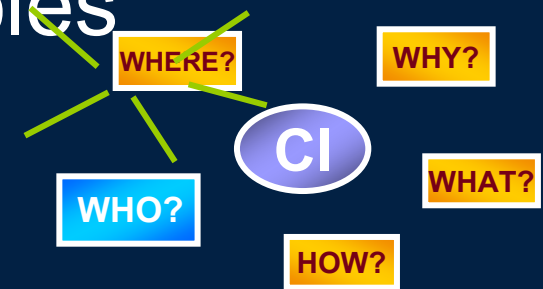
- Marketing = 35%
- Library = 26%
- Finance/Accounting = 0%
- Shared = 37%
- Other = 0%



Who: Finding the Right People & Resources

- Strategic Business Intelligence Roles

- Business Development Analysts
- Business Development Managers
- BI Manager
- Marketing Managers
- Librarians, Accountants, other functional areas



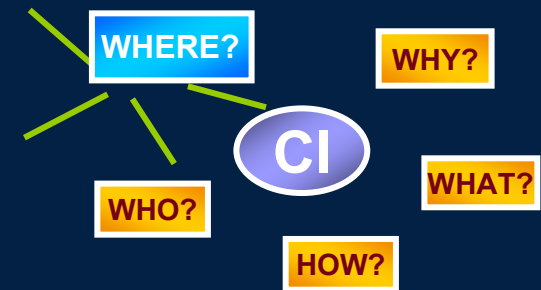
- Resources

- Lexis, Hoovers, InterAction, atVantage



Where: Supporting Firm Strategy

- Not how, but where
- Industry focus
 - top firm clients' industries
 - top growth industries





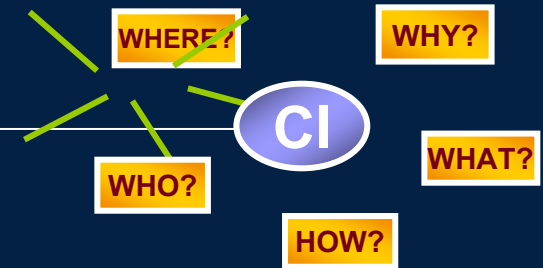
Challenges

- Finding “CI nuggets”
- Connecting the dots
- Paralysis of analysis
- Avoiding “distractions”



Summary

- Why: Objectives
- What: Measuring ROI
- How: Building bridges
- Who: Finding the right people and resources
- Where: Identifying opportunities



How are firms using this in practice?

Solving day to day challenges

Scenario 1

Your firm wishes to expand its business within the pharmaceutical industry.

Which companies should you focus on? What methods of growth? What do you do next?



When in doubt, take the client's point of view

LexisNexis® atVantage™
Welcome Darryl Cross [Logout](#)

Home
Prospect
Profile
Alert
Schedule
History
My Account
Administration

[Profile](#) > [Industry Profile](#) > Results

Actions:

Industry Profile: Pharma Industry Profile (2834)

Industry Overview

Business Reports

Litigation Trends

Pharmaceutical preparations (2834)

Overview

Industry Hierarchy: Division D: Manufacturing
Major Group 28: Chemicals And Allied
Pharmaceutical preparations (2834)

Industry Overview: Establishments primarily engaged in r
preparations for human or veterinary
finished in the form intended for final
medicinal powders, solutions, and sus
namely: (1) pharmaceutical preparati
professions, and (2) pharmaceutical p

Top Companies (By Sales)

Ticker	Company	Top Comp
JNJ	JOHNSON & JOHNSON (USD)	
PFE	PFIZER INC (USD)	
GSK	GLAXOSMITHKLINE PLC (BRITISH POUNDS)	
NVS	NOVARTIS INC (USD)	
SNY	SANOFI AVENTIS (EUROPEAN EUROS)	
AZN	ASTRAZENECA PLC (USD)	
MRK	MERCK & CO INC (USD)	
ABT	ABBOTT LABORATORIES (USD)	

LexisNexis® atVantage™
Close This Window

Copyright 2007 Datamonitor plc , All Rights Reserved
 Datamonitor - Industry Profiles
 August 15, 2007
INDUSTRY: Generics

OVERVIEW
VALUE
SEGMENTATION
COMPETITIVE LANDSCAPE
LEADING COMPANIES
FORECAST VALUE
MACROECONOMIC DATA
Return to Overview
***** DESCRIPTION *****

Market Definition:

The value of the generics market consists of all sales of generics drugs at ex-manufacturers prices. The market does not include animal healthcare products. Datamonitor defines a generic as a product, which is an officially approved copy of an original product whose patent has expired, marketed either as a brand or using the generic name. This definition excludes multi-source copy products that make up much of markets such as India, Spain and Italy. All currency conversions have been calculated at constant 2006 average exchange rates.


For the purpose of this report the Americas comprises Brazil, Canada, Mexico and the US.

Research Highlights:

* The Canadian generics market generated total revenues of \$3 billion in 2006, this representing a compound annual growth rate (CAGR) of 10.3% for the five-year period spanning 2002-2006.

* Ethical generic sales proved the most lucrative for the Canadian generics market in 2006, generating total revenues of \$2.8 billion, equivalent to 91.3% of the market's overall value.

* The performance of the market is forecast to decelerate, with an anticipated CAGR of 9.5% for the five-year period 2006-2011 expected



Home **Prospect** Profile Alert Schedule History My Account

[Prospect](#) > Company & Litigation Prospect List

Company & Litigation Prospect List

↔ (optional) Filter Results ↓ View Results [New Search](#) | [Prospecting Help](#)

- Company**
 - [Market Capitalization](#)
 - [Assets](#)
 - [Company Country](#)
 - [Company State/Province](#)
 - [Company Type](#)
 - [Earnings Per Share](#)
 - [Employees](#)
 - [EPS % Growth](#)
 - [Liabilities](#)
 - [Price/Earnings Ratio](#)
 - [Return on Equity](#)
 - [Sales/Revenue](#)
 - [Bullet Proof Rating](#)
- Industry**
 - [Industry SIC](#)
 - [Industry NAICS](#)
- Law Firm**
 - [Firm State/Province](#)
 - [Firm Number of Lawyers](#)
 - [Industry Groups](#)
 - [Practice Area](#)
 - [Year Established](#)
- Lawyer**
 - [Lawyer Practice Area](#)
 - [Lawyer State/Province](#)
 - [College](#)
 - [Law School](#)

Industry SIC -> Pharmaceutical preparations - 2834 | [Remove](#)
 Employees -> 1000 - 5000 | [Remove](#)
 Employees -> Over 5000 | [Remove](#)
 Firm Number of Lawyers -> 200 - 499 | [Remove](#)
 Firm Number of Lawyers -> Over 500 | [Remove](#)
 Case Type -> Patent - 830 | [Remove](#)

Companies **Firms** **Lawyers** **Cases**

Found 53 total records.    [View Tagged](#)

	<u>Company Name</u> ▲	<u>State/Province</u>	<u>Industry SIC</u>	<u>Industry NAICS</u>	<u># of Cases</u>	<u>Annual Revenue</u>	<u>C</u>
<input type="checkbox"/>	ABBOTT LABORATORIES	Illinois	Pharmaceutical preparations - 2834	Pharmaceutical Preparation Manufacturing - 325412	96	\$22,476,322,000	Pub Par
<input type="checkbox"/>	Aqouron Pharmaceuticals, Inc	California	Pharmaceutical preparations - 2834	Research and Development in the Physical, Engineering, and Life Sciences - 541710	3	\$153,100,000	Priv
<input type="checkbox"/>	ALLERGAN INC	California	Pharmaceutical preparations - 2834	Pharmaceutical Preparation Manufacturing - 325412	20	\$3,010,100,000	Pub Par
<input type="checkbox"/>	ALPHARMA INC	New Jersey	Pharmaceutical preparations - 2834	Pharmaceutical Preparation Manufacturing - 325412	2	\$653,828,000	Pub Par
<input type="checkbox"/>	AMWAY CORP	Michigan	Pharmaceutical preparations - 2834	Other Direct Selling Establishments - 454390	1	\$2,000,000,000	Priv Sul
<input type="checkbox"/>	Apotex Inc.		Pharmaceutical preparations - 2834	Pharmaceutical Preparation Manufacturing - 325412	17		Priv
<input type="checkbox"/>	ASTRAZENECA	Delaware	Pharmaceutical	Pharmaceutical Preparation	24	\$1,511,400,000	Priv

[Home](#) [Prospect](#) [Profile](#) [Alert](#) [Schedule](#) [History](#) [My Account](#)

[Prospect](#) > Company & Litigation Prospect List

Company & Litigation Prospect List

[\(optional\) Filter Results](#) [View Results](#) [New Search](#) | [Prospecting Help](#)

- Company**
 - [Market Capitalization](#)
 - [Assets](#)
 - [Company Country](#)
 - [Company State/Province](#)
 - [Company Type](#)
 - [Earnings Per Share](#)
 - [Employees](#)
 - [EPS % Growth](#)
 - [Liabilities](#)
 - [Price/Earnings Ratio](#)
 - [Return on Equity](#)
 - [Sales/Revenue](#)
 - [Bullet Proof Rating](#)
- Industry**
 - [Industry SIC](#)
 - [Industry NAICS](#)
- Law Firm**
 - [Firm State/Province](#)
 - [Firm Number of Lawyers](#)
 - [Industry Groups](#)
 - [Practice Area](#)
 - [Year Established](#)
- Lawyer**
 - [Lawyer Practice Area](#)
 - [Lawyer State/Province](#)
 - [College](#)
 - [Law School](#)

Rollup by Organization Rollup by Office

Industry SIC -> Pharmaceutical preparations - 2834 | [Remove](#)
 Employees -> 1000 - 5000 | [Remove](#)
 Employees -> Over 5000 | [Remove](#)
 Firm Number of Lawyers -> 200 - 499 | [Remove](#)
 Firm Number of Lawyers -> Over 500 | [Remove](#)
 Case Type -> Patent - 830 | [Remove](#)

[Companies](#) [Firms](#) [Lawyers](#) [Cases](#)

Found 131 total records.



[View Tagged](#)

	Firm Name ▲	# of Cases	City, State/Province	State/Province	Established	Number of Lawyers
<input type="checkbox"/>	Adams and Reese LLP	3	New Orleans, Louisiana	Louisiana		270
<input type="checkbox"/>	Akerman Senterfitt	10	Miami, Florida	Florida	1920	500
<input type="checkbox"/>	Akin Gump Strauss Hauer & Feld LLP	1	Dallas, Texas	Texas		743
<input type="checkbox"/>	Alston & Bird LLP	3	Atlanta, Georgia	Georgia	1893	700
<input type="checkbox"/>	Armstrong Teasdale LLP	1	St. Louis, Missouri	Missouri	1901	258
<input type="checkbox"/>	Arnold & Porter LLP	6	Washington, District of Columbia	District of Columbia	1946	556
<input type="checkbox"/>	Baker & Daniels LLP	3	Indianapolis, Indiana	Indiana	1863	372

Home **Prospect** Profile Alert Schedule History My Account

[Prospect](#) > Company & Litigation Prospect List




Company & Litigation Prospect List

↔ (optional) Filter Results ↓ View Results [New Search](#) | [Prospecting Help](#)

- Company**
 - [Market Capitalization](#)
 - [Assets](#)
 - [Company Country](#)
 - [Company State/Province](#)
 - [Company Type](#)
 - [Earnings Per Share](#)
 - [Employees](#)
 - [EPS % Growth](#)
 - [Liabilities](#)
 - [Price/Earnings Ratio](#)
 - [Return on Equity](#)
 - [Sales/Revenue](#)
 - [Bullet Proof Rating](#)
- Industry**
 - [Industry SIC](#)
 - [Industry NAICS](#)
- Law Firm**
 - [Firm State/Province](#)
 - [Firm Number of Lawyers](#)
 - [Industry Groups](#)
 - [Practice Area](#)
 - [Year Established](#)
- Lawyer**
 - [Lawyer Practice Area](#)
 - [Lawyer State/Province](#)
 - [College](#)
 - [Law School](#)

Industry SIC -> Pharmaceutical preparations - 2834 | [Remove](#)
 Employees -> 1000 - 5000 | [Remove](#)
 Employees -> Over 5000 | [Remove](#)
 Firm Number of Lawyers -> 200 - 499 | [Remove](#)
 Firm Number of Lawyers -> Over 500 | [Remove](#)
 Case Type -> Patent - 830 | [Remove](#)

Companies **Firms** **Lawyers** **Cases**

Found 814 total records.   

Lawyer Name ▲	Current Firm	# of Cases	City, State/Province	State/Province	Law School	College(s)
Abate, Samuel J.	Pepper Hamilton LLP	1	New York, New York	New York	Fordham University	Fordham University
Ablin, Karyn K.	Wiley Rein LLP	1	Washington, District of Columbia	District of Columbia	University of Virginia	Oral Roberts University
Abrams, Henry R.	Saul Ewing LLP	1	Baltimore, Maryland	Maryland	University of Maryland	Emory University School of Law
Abrams, Hugh A.	Sidley Austin LLP	8	Chicago, Illinois	Illinois	University of Illinois	University of Illinois
Agness, Bridgette	Sheppard, Mullin, Richter & Hampton LLP	1	Los Angeles, California	California	Loyola Law School	University of California
Alderson, Robert E.	Kramer Levin Naftalis & Frankel LLP	2	New York, New York	New York	University of Georgia	University of Georgia
Alexander, Paul	Heller Ehrman LLP	1	Menlo Park, California	California	University of Michigan	Westminster College, Fulton, MO
Allan, Michael J.	Steptoe & Johnson LLP	1	Washington, District of Columbia	District of Columbia	Syracuse University	Hamilton College

Scenario 2

Your firm wants to expand the work it does for one of your blue-chip clients, but it only is served by a single practice group.

How do you identify key relationships? How do you become the trusted advisor that will win you new business?



Start with relationships

The screenshot shows the Microsoft Outlook interface. The main window displays the contact details for Mr. Jeffrey Kindler Esq., General Counsel at Pfizer Incorporated. A red circle highlights the 'Related Contacts' tab, which shows a list of contacts who know Mr. Kindler. The table below lists these contacts:

Name	Job Title	Office	Relationship
Burns, David	Partner	Chicago	Knows
Enright, Karen	Senior Partner	Chicago	Knows
Roberts, Edward	Senior Partner	Chicago	Knows

Below the table, there are buttons for 'Add Related Contact', 'Send Inquiry to Co-workers Who Know', and 'View Related Contact...'. The contact's name and job title are also displayed at the bottom of the window.

Use segmentation to narrow the list and spot trends

The screenshot displays the Microsoft Outlook interface. The main window shows the 'Inbox' folder with a list of emails. A contact card for 'Mr. Jeffrey Kindler Esq.' is open, showing details for 'Pfizer Incorporated'. The contact card is segmented into several sections: 'Client Financial Information', 'Client Development Profile', and 'Company Profile'. A red oval highlights the 'Company Profile' section, which contains the following data:

Company Profile	
Industry:	Biotechnology
Annual Sales (MM):	\$51,298
Number of Employees:	115,000
Corporate Structure:	Public C Corporation
Ticker Symbol:	PFE
Company Ownership:	US - Public
Exchange:	NYSE
State of Incorporation:	DE
Metropolitan Area:	New York

The Outlook interface also shows a sidebar with 'Mail' folders and a taskbar at the bottom with several open applications.

Know the client's issues

Client Financial Information

YTD Revenue:	\$767,118
Last Year Revenue:	\$652,882
2 Years Ago Revenue:	\$234,773

Client Development Profile

[Go to Company Dossier](#)
[Go to Litigation History - US Federal Civil](#)

Company Profile

Industry:	Biotechnology
Annual Sales (MM):	\$51,298
Number of Employees:	115,000
Corporate Structure:	Public C Corporation
Ticker Symbol:	PFE
Company Ownership:	US - Public
Exchange:	NYSE
State of Incorporation:	DE
Metropolitan Area:	New York

All Selected Companies

Federal Case Types

Your selected companies were involved in 23451 cases in US Federal District Courts between 1/1/2001 and 9/12/2006, according to the breakdown of cases by type below.

Case Type	2001	2002	2003	2004	2005	2006	Total	Pct
Asbestos - 368	9513	1456	161	106	298	12	11546	49.23%
Product Liability - 365	597	606	985	3371	2499	2565	10623	45.30%
Fraud - 370	1	3	2	16	175	95	292	1.25%
Other Statutory Actions - 890	17	7	13	22	96	4	159	0.68%
Personal Injury - 360	9	7	32	30	67	12	157	0.67%
Autotools - 350	5	121	6	16	1	1	150	0.64%
Other Contract - 190	23	14	9	94	7	2	149	0.64%
Patent - 830	17	16	21	35	6	5	100	0.43%
Employment - 442	4	7	9	15	8	8	51	0.22%
Medical Malpractice - 362	12	4	4	8	3	3	34	0.14%
All Others	19	17	27	46	58	23	190	0.81%
Totals	10217	2258	1269	3759	3218	2730	23451	100.00%

Show Top 10 Results

Bar Chart Data:

Year	Asbestos	Product Liability	Other
2001	9513	597	10
2002	1456	606	10
2003	161	985	10
2004	106	3371	10
2005	298	2499	10
2006	12	2565	10

Pie Chart Data:

Case Type	Percentage
Asbestos - 368	49.23%
Product Liability - 365	45.30%
Other	5.47%

Know who else is in the game

Mail
Favorite Folders: Inbox, Unread Mail, For Follow Up, Sent Items
All Mail Folders: Deleted Items, Drafts, Inbox, Junk E-mail, Outbox, Sent Items, Search Folders

Inbox
From: Mr. Jeffrey Kindler Esq.
Subject: Contact Details - Kindler, Jeffrey Esq.
Received: 6/14/2006 3... 8 KB

Contact Details - Kindler, Jeffrey Esq.
General Counsel
Pfizer Incorporated
Contact Details - Pfizer Incorporated

Ass: Pfizer Incorporated (Pfizer)

Phones & Addresses | Related Contacts | Profiles | Lists | App

Client Financial Information
YTD Revenue: \$767,118
Last Year Revenue: \$652,882
2 Years Ago Revenue: \$239,773

Client Development Profile
[Go to Company Dossier](#)
[Go to Litigation History - US Federal Civil](#)

Company Profile
Industry: Biotechnology
Annual Sales (MM): \$51,298
Number of Employees: 115,000
Corporate Structure: Public C Corporation
Ticker Symbol: PFE
Company Ownership: US - Public
Exchange: NYSE
State of Incorporation: DE
Metropolitan Area: New York

Law Firm Representation
Your selected companies were involved in 23451 cases in US Federal District Courts between 1/1/2001 and 9/12/2006. The chart and graph below indicate the number of cases each Law Firm participated in. Note that multiple firms may have participated in some cases and no firms may be listed for others.

Law Firm	2001	2002	2003	2004	2005	2006	Total	Pct
Kaye Scholer LLP	109	132	606	737	214	16	1814	7.74%
O'Donnell Shaeffer Mortimer LLP	12	59	537	555	13	0	1176	5.01%
Beirne, Maynard & Parsons, L.L.P.	32	106	104	287	184	1	714	3.04%
Oppenheimer Wolff & Donnelly LLP	10	9	8	89	184	328	628	2.68%
Shook, Hardy & Bacon L.L.P.	10	3	12	15	166	160	366	1.56%
Irwin Fritchie Urquhart & Moore LLC	241	7	2	7	49	50	356	1.52%
Bradley Arant Rose & White LLP	17	63	33	75	13	24	225	0.96%
Watkins & Eager	30	76	68	20	19	12	225	0.96%
Gordon Hargrove & James, P.A.	21	16	8	16	48	97	206	0.88%
Clark, Thomas & Winters, A Professional Corporation	0	0	0	4	83	94	181	0.77%
All Others	675	521	326	577	834	554	3487	14.87%

Show Top 10 Results

This folder was last updated on 3/27/2006. Disconnected

7 Items

Start | Presentation1 | Inbox - Microsof... | InterAction - Ho... | Contact Details ... | Contact Detail... | 3:33 PM

Become the trusted advisor

The screenshot displays the LexisNexis atVantage web application interface. The main content area shows a news article titled "Report: Bristol-Myers urged to fire CEO" from AFX.COM, dated September 12, 2006. The article text includes: "AP (AFX) - -- A federal monitor urged the board of directors of Bristol-Myers Squibb Co. to fire Chief Executive Officer Richard Willard, The Wall Street Journal and The New York Times reported Tuesday. The meeting was attended by the U.S. Attorney for New Jersey, Christopher Christie, who appointed Mr. Lacey to the position. Mr. Lacey made his recommendation after finding that Bristol-Myers's actions in pursuing a deal to delay generic entry of its best-selling drug, the blockbuster blood thinner Plavix, violated the terms of a deferred prosecution agreement with the U.S. Attorney for New Jersey." The interface also features navigation tabs like "Home", "Identify & Qualify", and "Stay Informed", along with a sidebar for "Industry Profile: Pharmaceutical preparations (2834)".





Questions?