



Breakfast – Technology for Client Intelligence

Thursday 22 January 2004 08:15 – 11:00

Paris Grill – 18 Bury Street, London EC3A 5AX



Overview

Intelligence is crucial to decision making. Intelligence is crucial to winning and keeping new clients. Intelligence is crucial to profitable businesses. Globalisation, lower barriers to entry and volatile markets mean that intelligence about your clients, their competitors and the marketplaces in which they operate has never been more important.

Professional services firms are in increasing need of fast, accurate intelligence and ways of managing their relationships and client knowledge. Four recent advances in technology-based tools make this an excellent time for professional firms who are committed to their long-term client relationships to lay the foundations for continuing success. This seminar will demonstrate how these different tools can be used either individually or together to improve client relationship management and client intelligence.

The Seminar

This morning seminar will show how recent innovations can work to enhance your client intelligence. The outline is:

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| 08:15– 08:30 | Coffee and registration – Breakfast orders. |
| 08:30 – 08:40 | Introduction. |
| 08:40 – 09:00 | “Client Intelligence Now & In the Future”
by Dr Michael Jackson – Chief Executive of Shaping Tomorrow.com. |
| 09:00 –09:25 | “InterAction and Leveraging Client Relationships”
by Barry Solomon – Executive VP of Interface Software. |
| 09.25 – 09.50 | “One Stop Hit” – Smart Client Intelligence”
by Sebastian Leslie – MD of OneStopHit & Eric Eck of Lexwiser. |
| 09:50 – 10.15 | “PropheZy – Predicting Client Behaviour”
by Michael Mainelli - Chairman of Z/Yen Limited. |
| 10.15 – 10.40 | “Pitchbuilder – How to Pitch Smarter”
Robert Pay - CEO of Jaffe. |
| 10.40 – 11.00 | General Discussion and Close, speakers remaining until 11:15. |

Intended Audience

Senior professionals, heads of marketing and heads of research are the intended core audience. They should take away a better idea of the new types of technology that can help with client intelligence. Senior marketing personnel will benefit by seeing how professional services can use technology to help in the management of client relationships. While there will be a strong, City-firm emphasis, other professional services firms are welcome and will provide different perspectives.



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Format

The morning is meant to be participative and, recognising the heavy demands on professional services people's time, the seminar is intended to be a challenging, thought-provoking session. Further, with apologies to the speakers, breakfast will also be served. Numbers are strictly restricted. City-based practitioners should be able to be back at their offices before 11:30am. There is no charge for attendance or breakfast, therefore we kindly request participants to RSVP and keep us up to date on any changes in plans as a courtesy to others who would like to attend.

About Us

Z/Yen Limited is the UK's leading risk/reward management firm. Z/Yen's technology commercialisation work is at the junction of strategy, finance and technology, e.g. listing an Italian smart card company, preparing business plans for an Irish middleware firm, helping a public sector body exploit research, spinning out medical treatments from universities, developing a Japanese technology company's service strategy, or helping a large R&D company realise the value of its historic portfolio.

Shaping Tomorrow provides structured and easily accessible futures content from across the web for busy executives, futurists and researchers. Hand-selected links and articles on future trends, driving forces, scenarios and potential wildcards are continually being updated. A full range of futures tools and processes, actionable strategy building and change management sites is offered. You can share views with members of the futures community. Subscribers also receive a regular newsletter highlighting new topics and issues.

OneStopHit uses its proprietary software to search predefined data sources which can include third party websites such as FT.com (itself an aggregator of over 500 leading sources), Reuters and BBC; industry and market specific sources such as Legal Week; and clients' own sources such as intranet sites. From these, OneStopHit accesses and stores a unique reference library of content for each client. Suitable content is captured, classified and archived centrally. The library of content is built up over time and crucially, the content remains in the library even when it has been removed from the source website. This allows historical tracking of companies or markets.

InterAction is a unique software application focused exclusively on the needs of professional services organisations such as investment banks, private equity firms and law firms. The software allows a firm to leverage its collective relationships as an institutional asset. By uncovering valuable relationships that would otherwise remain hidden, and by allowing professionals to mine through and research contact information, InterAction helps its users to win new customers and generate more business from existing clients. This capability is known as Relationship Intelligence.

Jaffe Associates is a leading business development consultancy for professional services firms, operating in North America and Europe. Jaffe develops corporate and practice area business development strategies, to improve or implement client relationship programmes. Jaffe's clients include accounting, consulting and law firms, financial institutions and markets. Some of the Jaffe personnel are old enough to have developed 'high technology' marketing programmes for professional services firms.