



**LexisNexis® InterAction®**  
**Insights Dashboard**  
Get a “Big Picture” Perspective

## New Insights from a Very Familiar Source

Navigating today’s competitive landscape shows no signs of getting any easier. Faced with the continuing challenge of adding new clients and maintaining relationships with existing ones, firms are struggling to find honest answers to difficult questions. What’s the current level of activity with our key clients? How’s the total pipeline look for all the companies in that new industry segment we’re pursuing? Can we see what’s going on across all the companies in a corporate family? Do we have the right level of coverage to minimize the risks of client attrition?

Putting your firm’s business development picture in sharper focus may be easier than you expect. You already rely on the relationship data and contact details in your InterAction solution as a proven resource to pursue individual business leaders and companies. Now, with the new InterAction Insights Dashboard – an offering from the LexisNexis Professional Services group – you can extract more value from that content and open up new viewpoints full of potential.

### **Building More Profitable Relationships**

Using the InterAction Insights Dashboard, you can access and analyze key InterAction data to better understand your relationships, opportunities, and touch points across multiple companies, within industry segments, or based on other combinations that match your business development goals. Your team doesn’t have to resort to a one-company-at-a-time approach or execute multiple steps to reach a unified result. You have newfound abilities to validate business development touch points for target groups, determine “upside” potential with existing clients and address connection and continuity gaps to minimize attrition risks.

As an add-on to current InterAction capabilities, the Dashboard brings several benefits to your firm:

- **Focus on the Right Companies and Contacts:** Get a consolidated view of your relationships, touch points and opportunities across clusters of related companies, beyond what is available with the standard InterAction offerings. The new Dashboard offers perspectives to help you validate current strategies, make better decisions and guide your next business development initiatives.
- **Empower Users:** By making combined insights and results easier to obtain, the relationship power of InterAction becomes more pertinent to different users, including practice group leaders, client teams, or individual partners looking at metrics across industry and customer segments for expansion or growth. The aggregated data can also expose the need for real-time course corrections to client engagement strategies and programs.
- **Access at Will:** Professionals have the flexibility to use various desktop and laptop systems, browsers or even tablet devices that support on-the-go access and traveling with their consolidated data for later review. Pages and displays in the Dashboard tool are also user-configurable.

**Valuable Client Intelligence Displayed in an Easy-to-Understand Format**



The InterAction Insights Dashboard makes important information user-friendly and understandable, and comes equipped with a standard set of the most popular displays focused on:

Connection	Touchpoints	Opportunities
<ul style="list-style-type: none"> <li>• By Company</li> <li>• By Current Personnel and Alumni</li> </ul>	<ul style="list-style-type: none"> <li>• By Type</li> <li>• By Company</li> <li>• By Date</li> </ul>	<ul style="list-style-type: none"> <li>• Pipeline Stage</li> <li>• Pipeline by Type</li> <li>• Pipeline by Originator</li> <li>• Win/Loss Summary by Type</li> </ul>

Customized displays, focused on your firm’s unique requirements, can also be added to the standard Dashboard templates by the InterAction Professional Services team.

Assess your current performance and drive business development results with easy and convenient access to consolidated information. The InterAction Insights Dashboard will help you conduct side-by-side comparisons of client team performance, uncover cross-selling opportunities and identify clients or groups that need more attention. Find out what’s possible when you add a big picture perspective.

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