Welcome to Dallas!

September 22, 2009
Objectives

• Forum for CICs to receive:
  – Training on our products
  – Updates on LN, the PM business unit, and the CIC program

• Build relationships - enable open and direct dialogue between LexisNexis and CICs

• Networking with CIC colleagues facing the same everyday challenges you do
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## Agenda – Day 2

### 7:00 - 8:00
Breakfast and Lexpo

### 8:00 - 9:00
**Presenting an Integrated Solution - Linking Time Matters, PCLaw & Juris Products:**
Kelly Jones & Pat Cunningham

**HotDocs for Solo Practitioners and Small Law Firms:**
Valerie Connell

### 9:00 - 9:30
Break and Lexpo

### 9:30 - 10:00
LexisNexis Practice Management Business Unit Update:
Phil Livingston

### 10:00 - 11:00
Business Updates: CIC Program, Development, Technical Support, Implementation Services, Marketing, Community Management

### 11:00 - 11:45
Q&A Session

### 11:45 - 12:45
Lunch and Lexpo

### 12:45 - 1:45
Improving Workflow in the Practice:
Steve Best & Nancy Griffing

### 1:45 - 2:45
Integrating Time Matters with 3rd party tools and external applications:
Steve Stockstill

Integrating PCLaw with other Lexis products & 3rd Party Tools:
Steve Best

Integrating HotDocs with other Lexis products & 3rd party tools:
Seth Rowland

### 2:45 - 3:00
Break and Lexpo

### 3:00 - 4:00
Leveraging Technology Today and Beyond:
Dennis Kennedy

### 4:00 - 4:15
Closing Remarks:
Tim Angst

### 4:15 - 5:30
Input to Product Teams - PCLaw:
Audrey Mungal, Alan Tuback, Andy Mitchell

Input to Product Teams - Time Matters:
James Patterson, Steve Fetters, Mark McCray

Input to Product Teams / Interactive CIC Discussion:
Valerie Connell
LEXPO Exhibitors

- 35-45 Consulting Group, LLC
- Baytree Leasing Company
- Data Equity
- EaglePro Software
- Fujitsu Scanners
- GrayLint Enterprises, Inc.
- LexisNexis Practice Management Forms
- Nuance Communications – Dragon Naturally Speaking Software
- Payment Processes, Inc.
- Practice Development Partners, LLC
- Rocket Lawyer
- ScanPoint

LexisNexis Exhibits
- Total Practice Advantage
- Time Matters
- PCLaw
- Juris
- HotDocs
- Client Development
- Research
- Litigation Services
- LN Resources Booth
  - Training
  - Development input
  - Community management
  - Product management
Endorsement Training

Thursday, 9/24
9:00am – noon
1:00pm – 4:00pm

Time Matters Version 10 Endorsement Training
Wells Anderson

Implementation Plan
• Customer Business Focus
• Implementation Plan Framework
Installation
• Installation Preparation
• System Architecture
• Installation
Enhancements
• Overview
• New Feature Demonstration
Exam Preparation

PCLaw Version 10 Endorsement Training
Steve Best

PCLaw Accounting – Transaction Flow and Best Practices
• Review of General Ledger structure
• Review of GAAP
• Review of Accounting Methods
• Review of Control Accounts
• Review of Client Disbursement Accounts
• Review of Expense Recovery Accounts
Enhancements
• Safe Custody Feature
• Time Enhancements
• Banking and Billing Enhancements
• Usability and GL Enhancements
Exam Preparation
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Product Management Update

Jonah Paransky
Product Champion
2009 Practice Management Annual Conference

Agenda

- The Role of Product Management
- Team Introduction
- What we have learned about the market
- Positioning and Strategy for Practice Management
- AMP Policy Changes
- Product Sunsets
The Role of Product Management

- The aim of Product Management is to know and understand the market so well that the product or service fits him and sells itself
  - Modified Peter Drucker from Pragmatic Marketing
The Product Management Team

- Jonah Paransky
  Product Champion
  Cary

- Audrey Mungal
  Dir, Product Line Management
  Cary
  - Alan Tuback
    Product Manager
    Markham
    - TDI II
      Product Manager, Buyers and Channels

- James Paterson
  Dir, Product Line Management
  Cary
  - Steve Fetters
    Product Manager
    Cary
    - Katherine Watson
      Product Manager, Buyers and Channels
      Cary

- Loretta Ruppert
  Sr. Dir, Community Management
  Cary
Net Promoter Score (NPS) Overview

The Net Promoter Score (NPS) methodology is grounded in the need to routinely collect and analyze customer feedback in a consistent and comparable manner across all lines of business.

- Customers are asked to rate their likelihood to recommend a product or service to friends/colleagues/associates on an 11-point likelihood scale. NPS is derived from subtracting % of customers considered Detractors (rating 0-6 – not likely) from % of Promoters (rating 9 and 10 – very likely).

- On a scale of 0 to 10, how likely are you to recommend PCLaw to a colleague, associate or friend?

- The derived score reflects current levels of advocacy. Improving the score has been proven to correlate with profit growth.

- Top-of-mind rationale for/against likelihood to recommend (what is the single most important reason) helps define high impact actions necessary to solidify Customer relationships.

- You gave PCLaw a rating of ^X^. What is the single most important reason for giving PCLaw this rating?
Core Strategy

- Reposition current USPM products to grow leading market position
- Enrich content of Time Matters, Juris and PCLaw
- Improve quality and supportability of current product portfolio (e.g., reduce support issues, improve NPS)

Key Business Opportunities

- Small Law practice management market is highly fragmented – no product has majority share
- All providers have directionally negative net promoter scores – significant opportunity to improve loyalty and grow share
- Significant ability to improve results through excellence in execution
- LexisNexis content provides key distinctive competence
- Expand product distribution to grow routes to market, revenue
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“Growing Your Business”

Keith Hawk, VP Client Relations
LexisNexis, Inc.
Conscious Competence

SEL

4 predictable barriers

Ben Duffy

Discovery Skills

Bag Diver

P-P-P

Magic Question

Find the Questions inside the objection.

My success can only follow the success of my customer.
Consultative Relationship Process

- **Supporting**
  - Manage the Implementation
  - Deal with Dissatisfaction
  - Enhance the Relationship (Value Add)

- **Relating**
  - To Support The Decisions
  - To Overcome Trust Issues
  - To Validate You Can Help
  - To Understand Needs

- **Advocating**
  - Close on Agreements
  - LSCPA
    - Listen
    - Share
    - Clarify
    - Problem Solve
    - Ask for Action

- **Discovery**
  - Discovery Agreement
  - Questioning Skills
    - Permission Questions
    - Fact-Finding Questions
    - Feeling-Finding Questions
    - Best/Least
    - Say More
    - Catch-All

**Employee Skills**
- Empathy
  - Ben Duffy Skills

**Total Practice Solutions**
## 2009 Practice Management Annual Conference

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