



From the inception of Client Relationship Management systems, Professional Services Organizations (PSOs) have faced the challenge of exchanging information with the Personal Information Managers (PIMs) of their users. LexisNexis® InterAction® is at the forefront of both recognizing and addressing the challenges of exchanging PIM contact information. In 1997, InterAction became the first CRM system for PSOs to share information with Lotus Notes®. Since then, we have made significant advancements and have provided InterAction users with the richest and tightest integration in the industry.

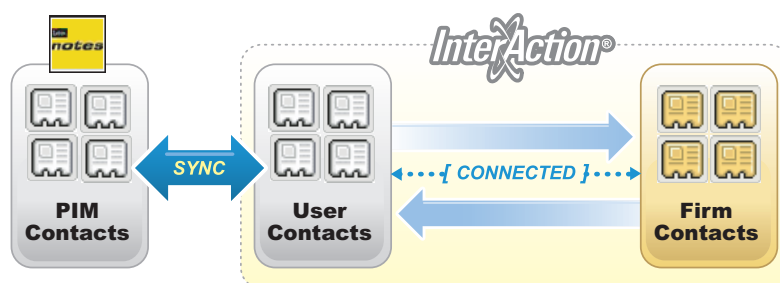
The Benefits of Information Exchange

The benefits of pulling contact information from a user's PIM, like Lotus Notes®, and collecting it within InterAction are many. First, a relationship is created automatically as a result of a contact in a user's PIM being connected to a contact in the central collection. No action is required on the part of the professional and users within a firm or organization can easily uncover a relationship that exists between the contact and a co-worker. Another benefit of contributing contact information is that the most complete and up-to-date information about a contact can be reflected immediately in the central collection. When a professional is meeting with a client or talking to a prospect on the phone, they can pull up the contact information in Notes and easily update key information, like their title or phone number. This information is passed through to the central collection and pushed out to other users within the firm or organization without the need for the professional to even launch the InterAction application.

The Challenges

While there are clear benefits to exchanging information with a user's PIM, there are certainly challenges that arise. Most traditional CRM systems do not have the safeguards in place to manage contact changes that flow to and from a user's PIM.

Synchronization Alone is Not the Answer – Without having the ability to manage and control data flowing in and out of a user's PIM, the synchronization of PIM data can cause many data quality problems. The system must be able to identify potential duplicates, make decisions about whether the contact is already in the central collection and must be able to identify potential unwanted changes being made to the contact. InterAction's Data Change Management and Smart Connect™ features ensure the data flowing back and forth between users is the most up-to-date and accurate information about that contact.

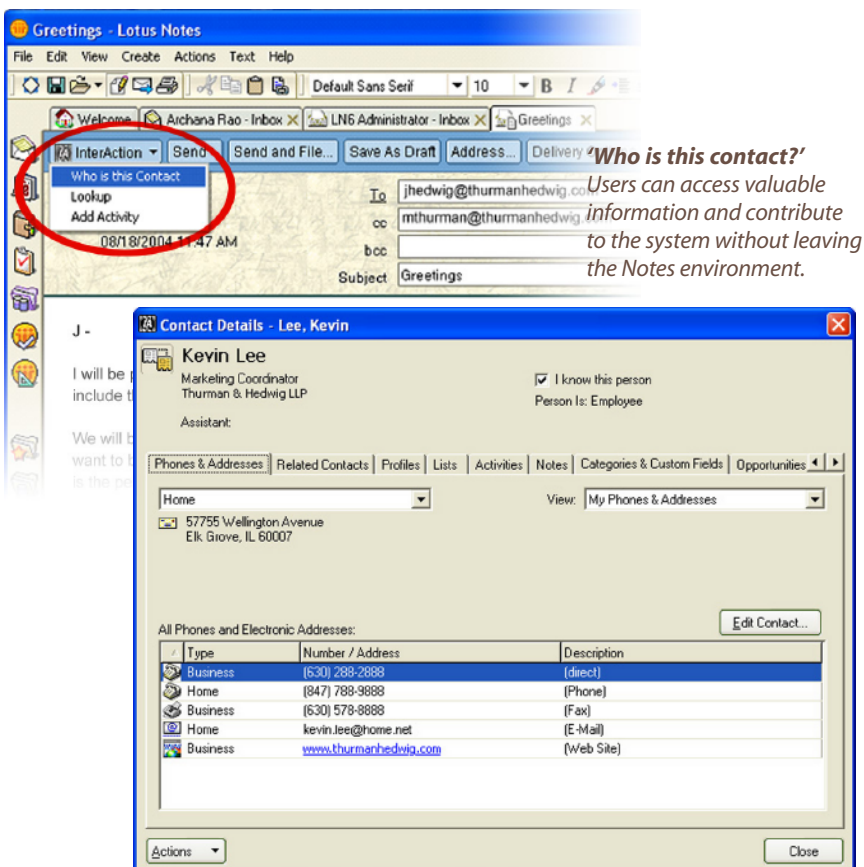


InterAction's Notes integration enables users to contribute and access valuable Relationship Intelligence from within Lotus Notes.

Getting Professionals to Contribute – Another challenge is to ensure that busy professionals will contribute information to the system. To do this, we have designed our PIM integration in such a way that users can contribute to the central collection while allowing them to stay within the PIM environment. Activities and calendar events can be created within Notes and reflected in InterAction quickly and easily, and the synchronization of contact data is done behind the scenes, requiring no user intervention. InterAction has also given professionals the ability to accept or reject changes that are made to their user contacts, providing them with the comfort of knowing that they have controls in place to monitor changes made to their most valued contacts.

The Power of InterAction for Lotus Notes

Because of the cultural challenges that organizations face when implementing a CRM solution, we have designed our integration with Lotus Notes to be full-featured and easy to use, allowing users to stay within this environment if they choose, while still contributing valuable information to the central collection.



Key Features

- Background, server-based synchronization – no user intervention required
- Ability to track and capture e-mail and meetings as Activities in InterAction while working online or offline
- Single click access to critical Relationship Intelligence details about the selected contact including: phone and addresses, relationships, notes, activities and more
- Ability to easily add InterAction contacts, assign Contact Types and add contacts to Mailing Lists and Working Lists with the new InterAction Contact wizard
- Sophisticated algorithms for duplicate checking to reduce the potential of creating duplicates in the system
- Easily access Relationship Intelligence information about a contact by selecting 'Who is this contact?' from within an e-mail message
- Ability to easily edit contact information in Notes and have it flow into the central collection
- Tightly integrated with Data Change Management to allow review of contact information by data administrators
- Smart Connect feature automatically connects a user's contacts with those in the central collection, eliminating the need for a user to take action
- 'Search InterAction' button can be used from within Notes to find InterAction contacts