

THOMSON REUTERS MONITOR SUITE

USING MONITOR SUITE OPPORTUNITY FINDER

Monitor Suite Opportunity Finder helps you quickly identify new business development growth opportunities and significantly decrease the amount of time it takes to identify and pursue these opportunities. By combining key company data and associated legal activity, Opportunity Finder uncovers and delivers more qualified targets while eliminating work-flow steps and information sources. Access Monitor Suite at www.monitorsuite.thomsonreuters.com.

Creating Custom Reports

Using the attributes unique to Opportunity Finder, you can create detailed custom searches by company, law firm, or attorney to filter your results and target prospects. Several examples of the complex custom searches you can create are listed below.

SAMPLE SEARCHES

Company: Companies headquartered in New York, New Jersey, or Pennsylvania with more than 100 employees and \$1 million in revenues with growing securities litigation, represented by law firms with more than 50 attorneys.

Law Firms: Law firms with offices in Illinois or Indiana with more than 50 attorneys, defending companies in product liability actions, and with a minimum of five cases.

Attorneys: Attorneys from law firms with 100-500 attorneys in Illinois who have litigated tort cases for the health care industry in Illinois state courts and the U.S. Court of Appeals for the Seventh Circuit, showing litigation growth.

Using the company search example above, complete the following to create a custom search and build a prospect list:

SELECT THE REPORT SUBJECT AND SUBJECT ATTRIBUTES

1. On the Monitor Suite home page, click **Opportunity Finder** in the tool bar at the top of the page. The Select Report Subject page is displayed.

The screenshot shows the 'MONITOR SUITE OPPORTUNITY FINDER' interface. At the top, there are navigation links: 'MONITOR SUITE', 'Opportunity Finder', 'Intelligence Center', 'Resources', and a user profile icon. Below the navigation is a blue header bar with the text 'MONITOR SUITE OPPORTUNITY FINDER'. Underneath the header, a progress bar shows four steps: 'Select Report Subject' (highlighted in orange), 'Select Report Subject Attributes', 'Select Legal Activity Attributes', and 'Format Report & Run'. The main content area contains the following text: 'Monitor Suite can create flexible, customizable prospect lists. Start by choosing one of the three subject options below.' Below this text are three cards representing different subject types:

- Company:** Use this option to create reports from the attributes of companies and their legal activities. Start by selecting Public, Private, or All Companies. A dropdown menu shows 'Public Only' and a 'CONTINUE' button.
- Law Firm:** Use this option to create reports from the attributes of law firms and their legal activities. A 'CONTINUE' button is present.
- Attorney:** Use this option to create reports from the attributes of attorneys and their legal activities. A 'CONTINUE' button is present.

2. Click **Public Only** in the drop-down list under Company and click **Continue**. The Select Report Subject Attributes page is displayed.

3. The Select Report Subject Attributes page defaults to the Company Location filter. Select **United States** and then select the check boxes for **New Jersey**, **New York**, and **Pennsylvania**. Click **Add selected to Report Criteria**.

4. Click **Employee Size** in the left column, select the check box for **Number of Employees**, and click **Add selected to Report Criteria**. In the displayed window, select **More than** and enter **100** in the corresponding field. Then, click **Include Selected**.

5. Click **Revenue** in the left column. Select the check box for **Most Recent Fiscal Year** and click **Add selected to Report Criteria**. In the displayed window, select **More than** and enter **1,000,000** in the corresponding field. Then, click **Include Selected**.

Note: As you add filters to your search criteria, they are displayed under Report Criteria in the right column.

6. When you are finished selecting your report filters, click **Continue**. The Select Legal Activity Attributes page is displayed.

MONITOR SUITE OPPORTUNITY FINDER

Select Report Subject Select Report Subject Attributes **Select Legal Activity Attributes** Format Report & Run

Choose One Legal Activity Type: Litigation | Deal M&A | Deal R&P | Patent | Trademark

Litigation

Document Type
Class Action
Court
Practice Area NOS Practice Area
Monitor Suite Practice Area
Law Firm Representation
Attorney Representation
Legal Role
Thresholds

NOS Practice Area

Select All | Clear selected | Add selected to Report Criteria

- Federal NOS: Bankruptcy: Appeal 28 USC 158 (422)
- Federal NOS: Bankruptcy: Withdrawal 28 USC 157 (423)
- Federal NOS: Civil Rights: ADA-Employment (445)
- Federal NOS: Civil Rights: ADA-Other (446)
- Federal NOS: Civil Rights: Employment (442)
- Federal NOS: Civil Rights: Housing/Accommodations (443)
- Federal NOS: Civil Rights: Other Civil Rights (440)
- Federal NOS: Civil Rights: Voting (441)
- Federal NOS: Civil Rights: Welfare (444)
- Federal NOS: Contract: Contract Product Liability (195)
- Federal NOS: Contract: Insurance (110)
- Federal NOS: Contract: Marine (120)
- Federal NOS: Contract: Medicare Act (151)

Report Criteria

Company Activity

Company Location:
New Jersey New Jersey
New York New York
Pennsylvania Pennsylvania

Employee Size:
Number of Employees: More than 100

Current Revenue:
Most Recent Fiscal Year: More than \$1,000,000

Previous **CONTINUE**

SELECT LEGAL ACTIVITY ATTRIBUTES

1. The Select Legal Activity Attributes page defaults to the Litigation activity type. You can also choose to search legal activity attributes for Deal - Mergers & Acquisitions, Deal - Registrations & Prospectus, Patent, or Trademark. Click **Practice Area** in the left column and click **Monitor Suite Practice Area** (Alternatively, you can choose **NOS Practice Area**). Select the check box for **Securities Law** and click **Add selected to Report Criteria**.
2. Click **Law Firm Representation**, **Law Firm Size** in the left column. Select the check box for **Number of Attorneys** and click **Add selected to Report Criteria**. In the displayed window, select **More than** and enter **50** in the field. Then, click **Include Selected**.
3. When you are finished selecting your report filters, click **Continue**. The Format Report & Run page is displayed.

MONITOR SUITE OPPORTUNITY FINDER

Select Report Subject Select Report Subject Attributes Select Legal Activity Attributes **Format Report & Run**

Criteria Report

Data Report Display

Sort Order

Report Criteria

627 Companies

Data Report Display

Company Name

Sort Order

Primary Sort Order: Company Name

Previous **SUBMIT**

FORMAT AND RUN THE REPORT

1. The Format Report & Run page defaults to the Data Report Display section. Select the check boxes for the information you want to display in the report, and click **Add selected to Report Criteria**.
2. Click **Sort Order** in the left column. The default sort order is Company Name. Select another sort order if desired, and click **Add selected to Report Criteria**.
3. Click **Submit**. A message is displayed indicating the report will be generated within a few minutes. The email address to which the report will be sent is displayed. Edit the email address as necessary. To send the report to multiple recipients, add email addresses separated by commas.
4. Click **Confirm**. A confirmation message is displayed.
5. Click **OK**.
6. When the report is available, you will be notified by email. Do one of the following:
 - To view the report criteria, download the report, or save the report for later use, click the first link in the email notification. The Recent Opportunity Finder Reports page is displayed.
 - To download the report directly from the email without viewing the report criteria, click the second link in the email notification.

LOOKING FOR MORE INFORMATION?

Monitor Suite is available on the Web at monitorsuite.thomsonreuters.com.

For assistance using Monitor Suite, call 1-877-347-6360.

For free reference materials, visit legalsolutions.com/law-products/support/monitor-suite