

## 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](http://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 is a navigation bar with 'MONITOR SUITE™', 'Opportunity Finder', 'Intelligence Center', and 'Resources'. Below this is a progress bar with four steps: 'Select Report Subject' (highlighted in orange), 'Select Report Subject Attributes', 'Select Legal Activity Attributes', and 'Format Report & Run'. The main content area has a heading 'MONITOR SUITE OPPORTUNITY FINDER' and a sub-heading 'Select Report Subject'. Below this, a message states: 'Monitor Suite can create flexible, customizable prospect lists. Start by choosing one of the three subject options below.' There are three columns of options: 'Company' (with a description and a 'Public Only' dropdown), 'Law Firm' (with a description), and 'Attorney' (with a description). Each column has a 'CONTINUE' button at the bottom.

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

MONITOR SUITE™ Opportunity Finder Intelligence Center Resources

MONITOR SUITE OPPORTUNITY FINDER

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

**Company**

Company Location Industry Employee Size Revenue

Search Company Location SEARCH

Company Location

Select All | Clear selected | Add selected to Report Criteria

- ☒ United States
- ☐ Americas (except US)
- ☐ Europe
- ☐ Africa
- ☐ Asia
- ☐ Australia and Oceania

Report Criteria

Previous CONTINUE

- 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**.
- 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**.
- 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.

MONITOR SUITE™ Opportunity Finder Intelligence Center Resources

MONITOR SUITE OPPORTUNITY FINDER

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

**Company**

Company Location Industry Employee Size Revenue

Current Revenue

Select All | Clear selected | Add selected to Report Criteria

- ☒ Most Recent Fiscal Year
- ☐ Most Recent Quarter

Report Criteria GET COUNT

**Company**

Company Location:

- New Jersey
- New York
- Pennsylvania

Employee Size:

Number of Employees: More than 100

Revenue, Current Revenue:

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

Previous CONTINUE

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

### 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.

## 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.

MONITOR SUITE™

Opportunity Finder

Intelligence Center

Resources

OPPORTUNITY FINDER REPORT MANAGEMENT

myMONITOR

Preferences

Recent Searches

Saved Searches

Saved Search Templates

Saved Report Output Formats

Saved Snippets

Saved Images

Portal Link Management

Recent Opportunity Finder Reports

Company

Saved Opportunity Finder Reports

Recent Opportunity Finder Reports: Company

	DATE CREATED	COMPANY CRITERIA	LEGAL ACTIVITY CRITERIA	EXPIRATION (Days)
<div>Download</div> <div>Save</div>	3/6/2017 9:38 AM	Company Type: Public Only Company Location: New Jersey New York Pennsylvania Employee Size: Number of Employees: More Than 100 <a href="#">expand view &gt;&gt;</a>		14

### LOOKING FOR MORE INFORMATION?

Monitor Suite is available on the Web at [monitorsuite.thomsonreuters.com](http://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](http://legalsolutions.com/law-products/support/monitor-suite)

