



PRODUCT NAME:
AGENT COMMUNITY GEN2

VENDOR NAME: CONNOTATE

VENDOR WEB SITE:
www.connotate.com

COMPANY SUMMARY:
Connotate is changing the way businesses leverage information from the Web and Enterprise.

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Case Study: An Investment Bank

A major investment bank adopted the Connotate solution and achieved substantial results within one year. The financial services firm used the power of intelligent Agents to harvest data that could be interpreted in new ways, to generate alerts, and uncover leading indicators from a sea of information.

THE PROBLEM

Investment management firms must deliver proprietary trading insights ahead of their competitors and anticipate market trends. In the fiercely competitive world of investment management, uncovering and delivering innovative research is vital to an investment bank's success. One of the world's largest diversified financial services companies approached Connotate looking for a better solution to the problem common to many modern businesses: a mind-boggling sea of data.

This firm manages more than \$600 billion in assets and maintains offices in more than 30 countries. Traditionally, such investment banks encouraged investment activity by offering insightful research. Producing unique research has grown more challenging with the explosion of data on the Web. There are now more than 700 billion web pages on the Internet. At financial services firms or hedge funds, people report spending a quarter or half their time just gathering information—surfing the web, cutting, pasting and reformatting. Some members of the staff, such as junior analysts, spend the majority of their time doing this grunt work although they were hired for their analytical abilities.

Consider an analyst tasked with monitoring the number of homes for sale on a particular home builder's web site. The analyst would have to visit the site every day and check inventory and sales activity. Even if the analyst just focused on one homebuilder rather than a comprehensive view across a set of home builders, the manual effort would be overwhelming. Soon meetings and other duties would make it almost impossible to

maintain this mundane routine and throw the analyst off schedule. Even the best minds in the business can't perform to their potential if they spend a disproportionate amount of time sifting through information. Clearly, a better solution was needed.

The client identified two main objectives:

- Automate web data gathering efforts, which were being performed by analysts on an occasional, haphazard basis.
- Innovate ways to generate new ideas and gather web data in order to cultivate alpha boosting ideas.

THE SOLUTION

The firm selected Connotate to automate its data harvesting. Deploying Connotate Agents freed analysts to expand their research efforts and spend more of their time making the sorts of decisions and judgments that only humans can.

Intelligent Agents go out at the same time every day and gather thousands of data points from disparate web sites and compile it in whatever format the client desires. These Agents allowed the client to automate complicated tasks such as monitoring online consumer marketplaces in several countries – a task that would have been extremely difficult to perform manually.

JOB POSTINGS: Connotate's intelligent Agents can reveal leading indicators that give the client an advantage over competitors who haven't figured out a way to see through the blinding snowstorm of data on the Web. Agent Community GEN2 allows analysts to slice data in new ways and develop new, innovative sources of information. For example, job postings have long been public, but until recently they have not been fully exploited as valuable sources of information. A cluster of postings for a certain type of qualifications might suggest that a company is undertaking some kind of new initiative. Connotate can provide a time-series analysis and reveal trend lines that illustrate how many software developers a company is hiring, or how much the company is expanding in Asia or Europe. Similarly, an increase in job postings might indicate that management is confident that future prospects are good. On the other hand, it also could foretell bad news before it becomes public: the sudden removal of job postings may be an early warning that a company expects poor quarterly earnings. Armed with such insight, a trader might take a very profitable position.

Of course, even the best information does little good unless it reaches the right person. Fortunately intelligent Agents can be directed to automatically monitor conditions around the clock and send alerts via email, to a mobile device, or in whatever format the client chooses.

CURRENCY MARKETS: Another example of alerts comes from currency markets – an area of obvious interest for financial institutions. Agents can pick up news that normally wouldn't make it into the mainstream newswires. Connotate Agents were able to pick up warnings of a coup in Fiji from local newspapers before the news circulated the mainstream newswires. Again, the investment bank was able to take advantage of this information.

TRAVEL PRICING: Imagine going to an airline web site every hour to check on ticket price and availability for hundreds of flights. A human could do that for only a short time before he or she became distracted by other duties, bored, and increasingly prone to error. The Connotate solution automates these repetitive tasks on a scale unachievable by humans. Thus a travel analyst can employ Connotate Agents to monitor airline ticket prices, cruise line packages, and other travel indicators around the clock. By checking travel pricing for several hundred trip scenarios several times each week, price fluctuations can be monitored, providing a window into consumer trends, the travel industry, and many other interesting points for analysis.

BENEFITS

Connotate's solution helped the firm automate – check web sites as frequently as desired for new or updated information – and innovate – use the information in new and interesting ways to reveal patterns that provide a new angle on the direction that a given publicly traded company is taking.

This firm achieved substantial results within one year. Financial institutions are characteristically unwilling to quantify their results, but perhaps other metrics can be examined. The firm expanded its use of Connotate from North America to Europe and Asia. The managers who oversaw the project were promoted. And one manager said, "We cannot operate without it."

ABOUT CONNOTATE

Connotate's premium solution goes far beyond search allowing users to quickly create and share on-demand applications that discern high value information, automate repetitive tasks, provide analysis and alerts from information found on the Web and across the Enterprise. Its machine-intelligent Agents can do anything a human can do to monitor, mine, analyze, mashup and deliver high value content. Agents operate on a fully-automated, 24 x 7 basis. Connotate Agent Community GEN2™ is a robust, flexible and scalable platform. Agents are created using an intuitive GUI that supports fast and easy configuration by end-users without programming experience. Content is delivered over any number of media including XML, RSS, email, text messaging, file systems, direct feeds to SQL databases and Excel.

Connotate's clients include large hedge funds and financial services firms; many of the largest global publishers and online media companies; pharmaceutical, energy and Internet companies; and federal and state government agencies. Connotate was the recipient of the 2007 KM Promise Award and has been named one of the "100 Companies That Matter in Knowledge Management" by KMWorld for four consecutive years. Connotate's investors include Goldman Sachs; a relationship that includes a joint marketing agreement in which Goldman Sachs' Hudson Street Services offers Connotate's solution to its investor client base.

PRODUCT OVERVIEW

Agent Community GEN2

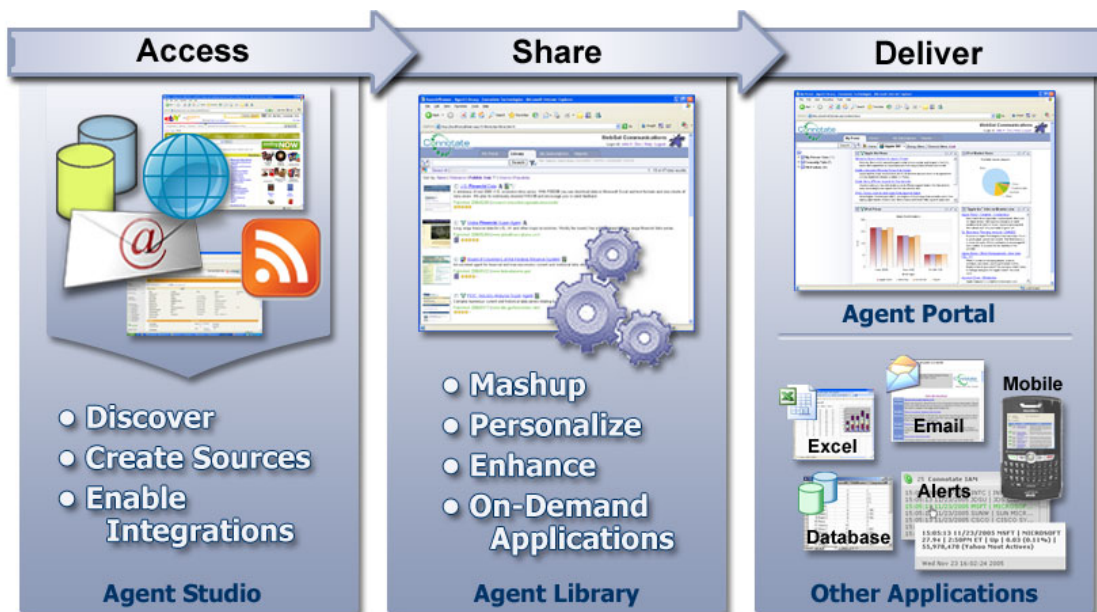
Connotate's Agent Community GEN2 is a powerful business intelligence solution that places information access, analysis, and automation right at your fingertips. Based on Enterprise 2.0 principles, GEN2 provides the Enterprise with a complete information access ecosystem. The platform offers a number of features that empower your workforce with tools for idea generation, personalized monitoring, precision harvesting, data mashup, and rapid integration. Without the need for programming, Agent Community GEN2 increases productivity by a factor from 10 to 100 by eliminating more than 40% of the time spent hunting, gathering, and manually integrating data from disparate internal and external sources.

Connotate empowers the business user with the ability to reach and unleash dynamic content buried deep within the Web and the Enterprise through a virtual workforce of machine-intelligent software Agents. With patented machine intelligence and simple point-and-click technology, Agents can be trained in minutes and can perform almost any human interaction with data. Non-technical users can deploy Agents to quickly create and share on-demand applications that discern high-value information, automate repetitive tasks, provide analysis and alerts, and deliver results to a variety of end media. Agent Community GEN2 also helps technical staff or information services by generating awareness of information available through enterprise applications as well as by promoting adoption of those applications.

Use Agent Community GEN2 to:

- Automate access to and collection and integration of dynamic content from unlimited structured and unstructured sources.
- Penetrate the 700 billion "deep Web" pages not indexed by Google or Yahoo.
- Monitor and extract text, data and pictures from sources in any language that can be shared throughout the organization.
- Provide timely, precise monitoring, surveillance and extraction of time-sensitive, essential information (e.g., earnings, business intelligence, competitive intelligence, SEC filings, international developments, etc.).
- Remove knowledge acquisition bottlenecks within your organization.
- Access a user-created library of best BI/KM sources and practices.
- Uncover business intelligence through access to a number of content-rich internal and external sites.
- Utilize "data feeds" for other knowledge management applications such as text mining, categorization, RSS, enterprise information systems and portals.
- Support better, faster decision-making by sharing information throughout the organization.
- Transform static information stores into automated, real-time data feeds.

Connotate's Agent Community GEN2 is a three pillar approach to information access comprised of the following components:



AGENT STUDIO: A visual, point-and-click Agent creation interface empowering non-technical users to build powerful Agents.

AGENT LIBRARY: A browser-based hub for collaborative business intelligence that provides users with a platform to share and personalize Connotate Intelligent Agents.

AGENT PORTAL: An internal community platform for Accessing, Sharing and Delivering actionable intelligence.

The environment is powered by the Agent Server – A proven highly scalable, Enterprise-level engine for running the Agents. Working together, these components represent a robust infrastructure enabling the configuration of "on-demand" applications. They enhance organizational agility and knowledge, while reducing time-to-market cycles.