Rebuilding from the Inside Out

MarkLogic Digital Publishing Summit

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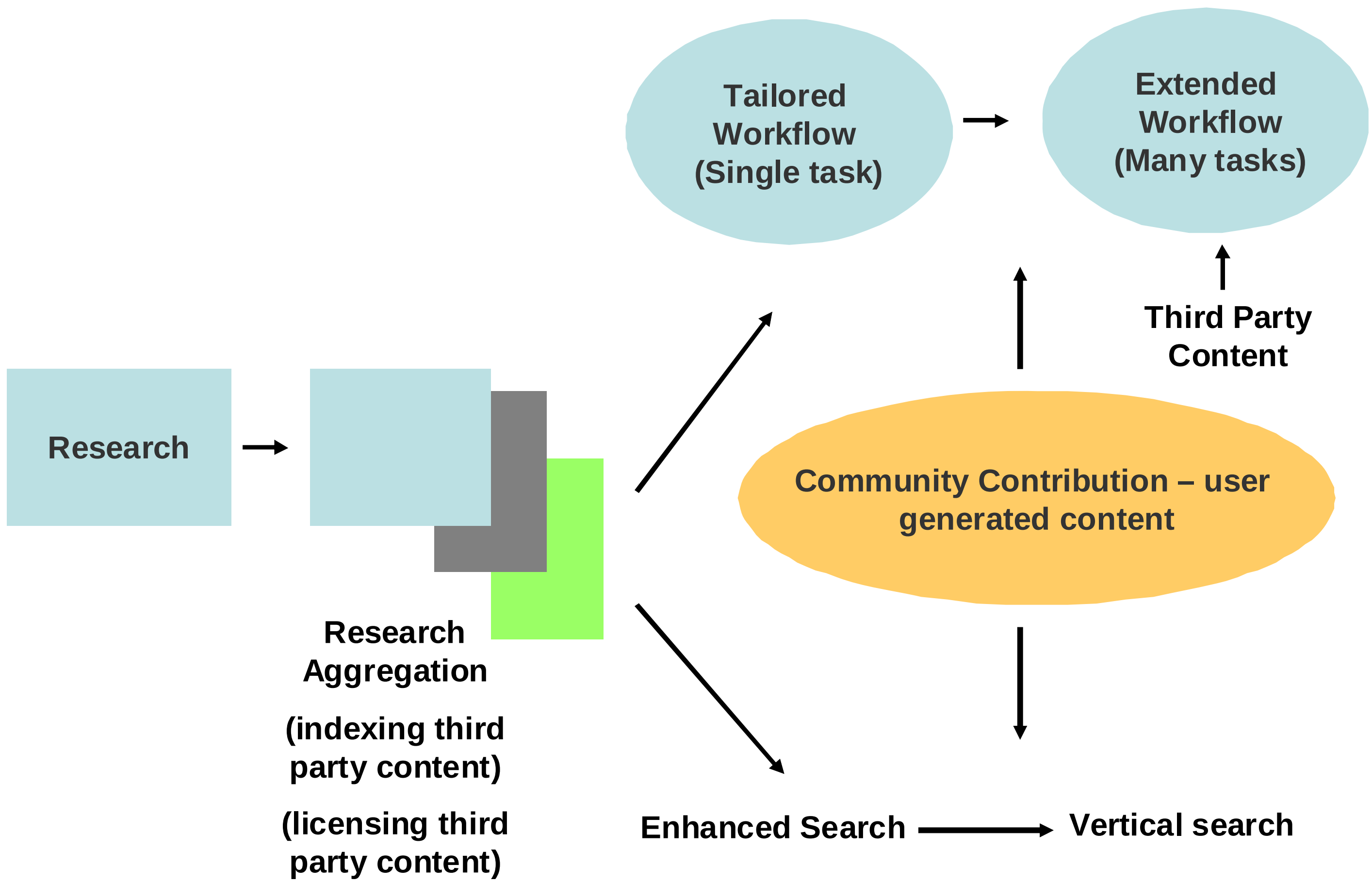
The End of Growth?

- Advertising-led media return to profitability – in smaller companies
- Business media find that the niche has shrunk – and the supply chain is truncated
- Education finds that the state interest diminishes and private budgets cannot cope
- Professional information must earn its keep through demonstrated productivity

Re-igniting Growth

- The end of the B2B portfolio and the dominance of niche
- The emergence of fully integrated content/software information solutions companies
- Growth through M&A/industry restructuring
- The dominance of the workflow concept

From Research to Process: the evolution of information services



The Components of Workflow Solutions

Increasing Market pressures on cost, quality and pricing

PRODUCTIVITY

- Did we save time?
- Or people?
- Or resources?

DECISION-MAKING

- Did we know what we should know?
- Needed to know?
- What we didn't know was available to know?

COMPLIANCE

- Did we observe our own standards and practices?
- Our industry/self-regulatory rules?
- Legally enforceable standards and regulations?
- More cost-effectively than before?

Enhanced Competitive Positioning

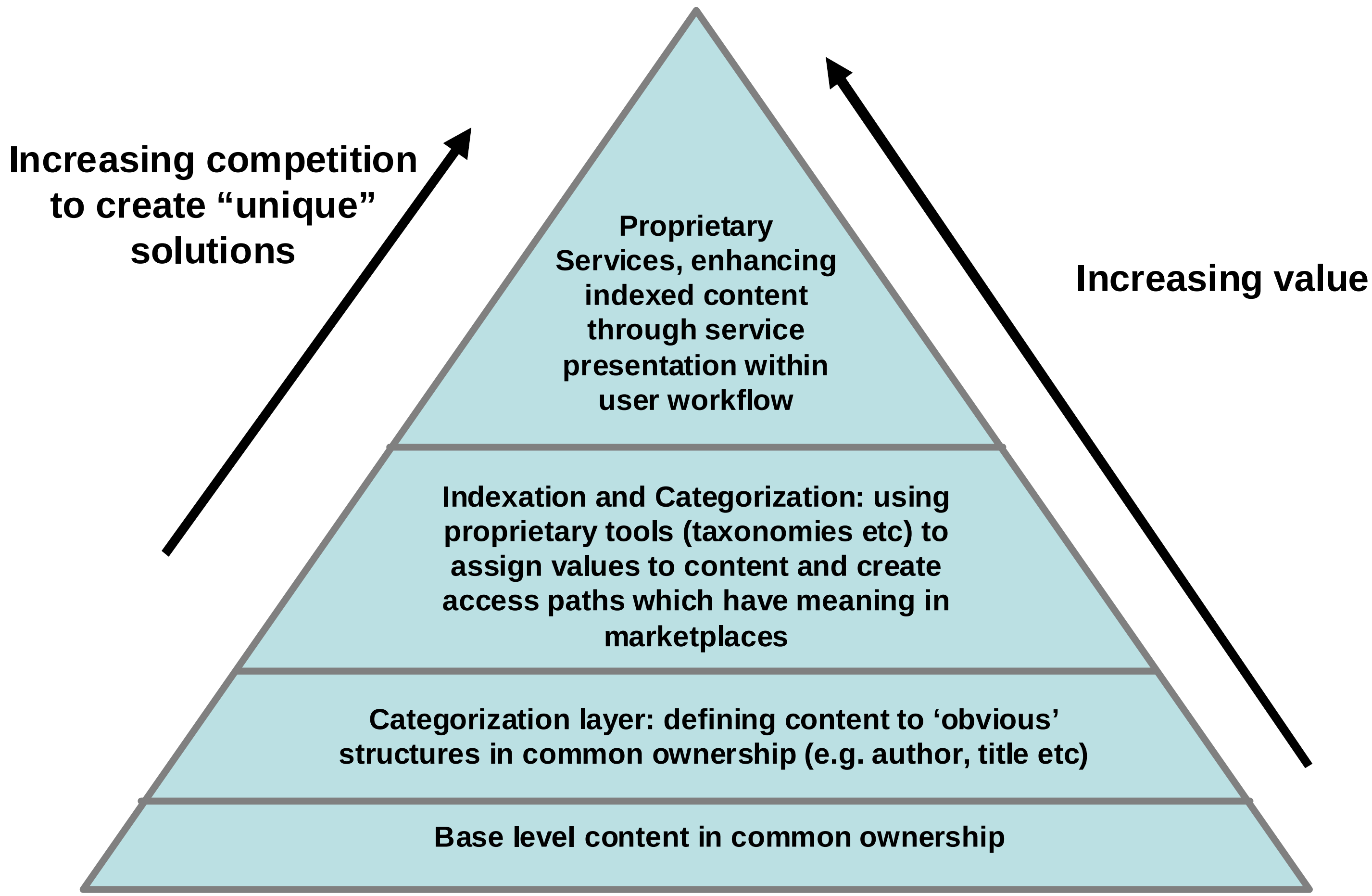
Regenerating Growth

Match content to users in new ways	Match metadata to workflow to create new values	Match workflow values to new users to create growth

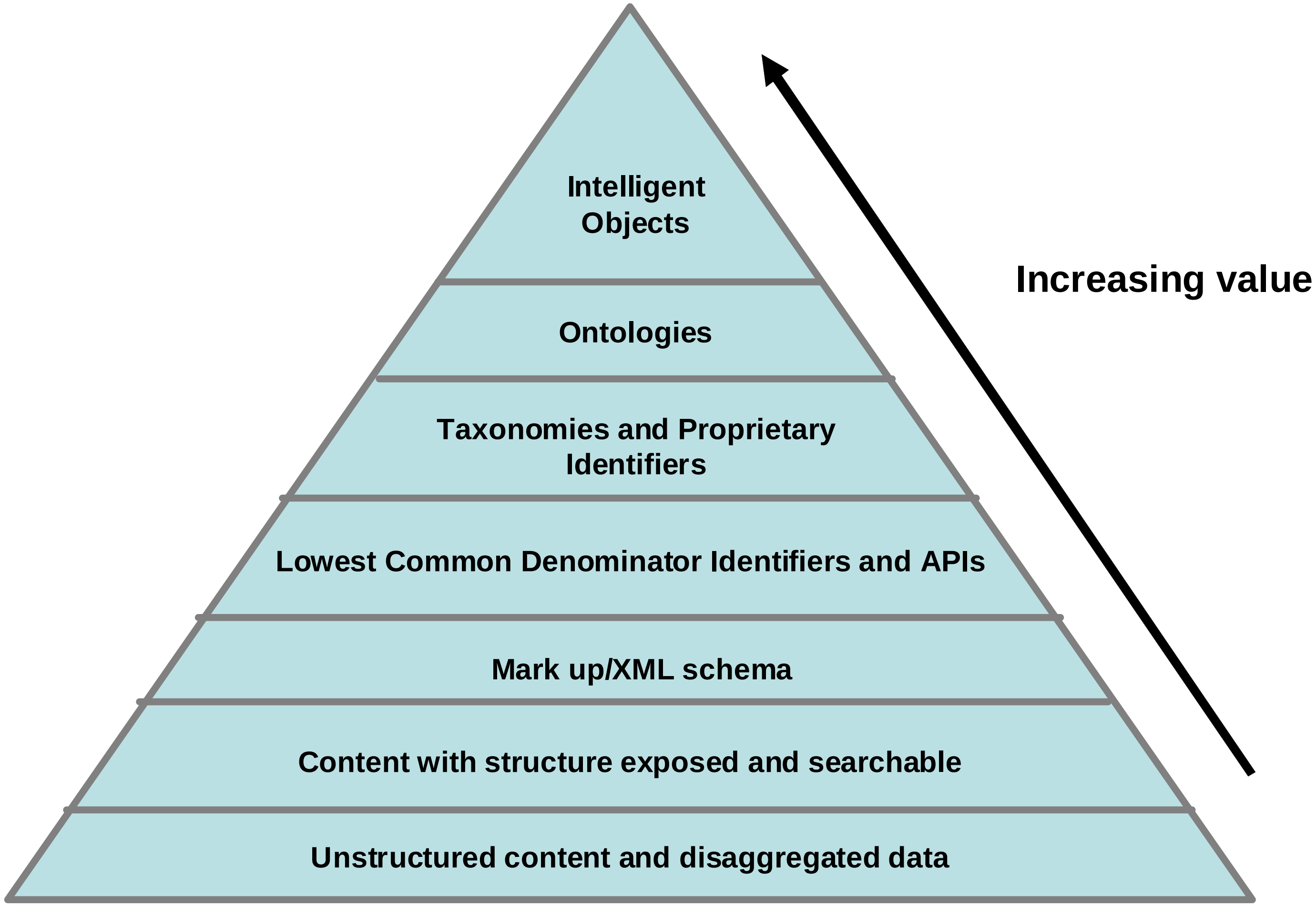
Thomson Reuters GRC – a Case Study in Growth Generation

- Strategy driven from the top
- Brings together data and client resources from two major divisions
- Acquisitions (Paisley, Complinet) fire the process
- Opens the door to new growth points from cross selling client services/front and back offices

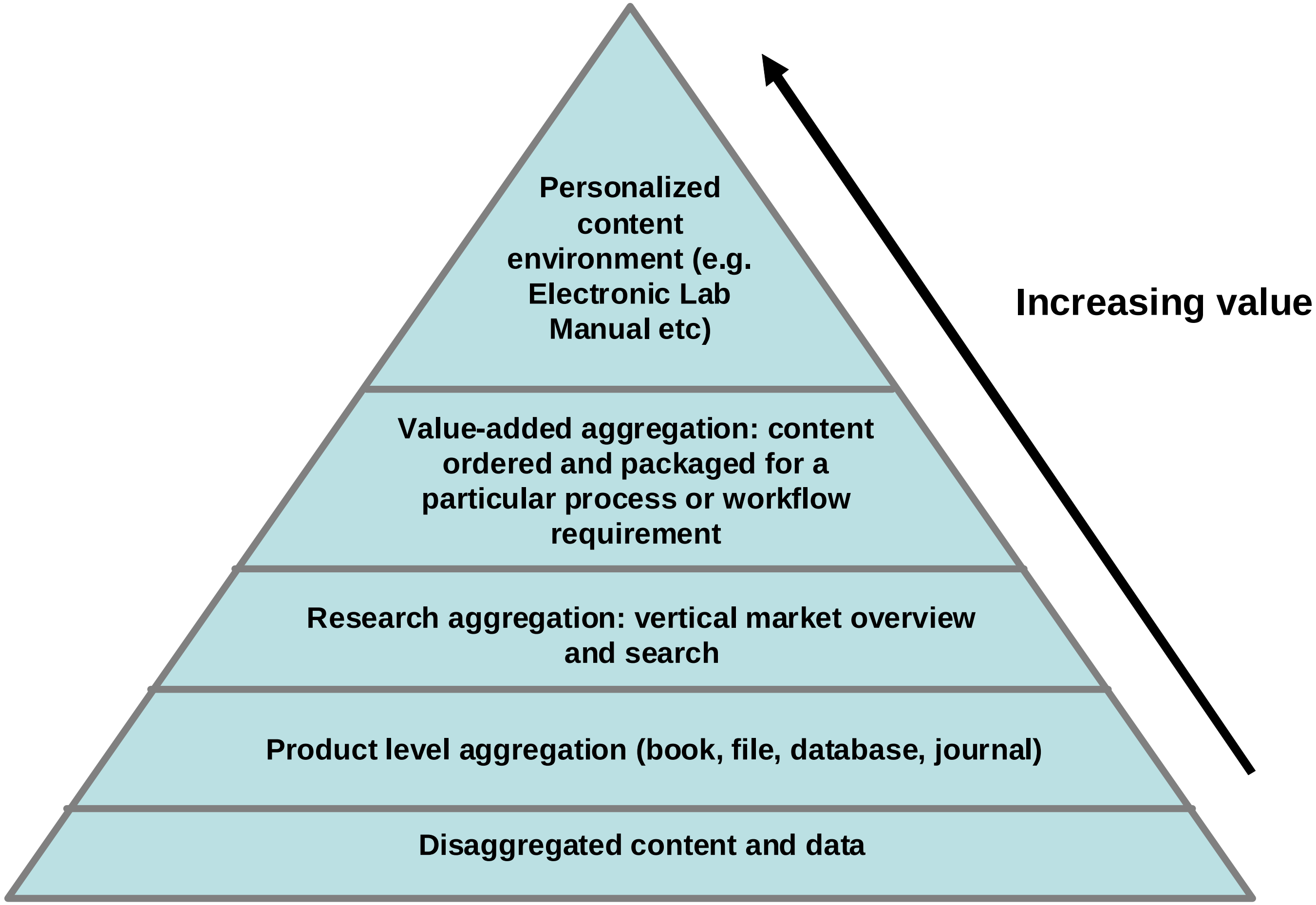
Ownership and Control in the Information Cycle



The Metadata Value Cycle



The Content Value Cycle



Conclusions

- Information Services and Solutions companies will grow through the ability to sell more to existing clients
- Education, in this sense, is an information solution
- There will be fewer and bigger players, at the expense of the mid-size sector
- Success depends entirely upon sufficient control of content, through structure and metadata, to be opportunistic

Conclusions

- Success in absorbing third party and user-generated content is also vital
- Workflow solutions depend entirely upon appropriate behavioural analysis and a realization of user value
- Once in place, these solutions will have repeat subscription business and high margins
- But a tendency to duopoly will also be a result

Thanks for listening!

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