
Leveraging Tomorrow's Technology Today

National Directory Conference
September 2000 • Philadelphia

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For directory publishers,
the Internet and the
technologies associated with it
represent a two-edged sword



Technology: Bad

- Reduced barriers to marketplace entry
 - Everyone is now a publisher
- Destroying copyright
 - Perfect copies: fast, easy, free.
- Disintermediator
 - If you can get information easily – and in many cases free – why pay someone to do it for you?
 - Your customers are becoming your competitors
- Search engines
 - “The poor man’s directory”
- Increased expectations
 - “Because it can be done means it is being done”



Technology: Good

- Easier to collect information than ever before
 - Moving beyond mail, fax, call, mail again, fax again, call again
- Faster, easier and cheaper to distribute information than ever more
- More ways to add value to your data than ever before
 - Hyperlinks are only the beginning
- More ways to sell your data than ever before
 - “By the slice” can generate incremental revenue
 - Intranet opportunities are significant
- Easier to integrate your data into customer software applications
 - The Internet provides a common platform



These technologies will enable us to
add more value to our products
– the number one imperative for every
directory publisher today.



Computer-Aided Editing

- Intelligent spiders will watch Web pages of listed companies and immediately report and highlight changes
- RIP-OFF software can download Web databases
 - (Real-time Iterative Process for Obtaining Fielded Files)
- Intelligent agents can monitor news feeds and capture stories on 1 or 10,000 companies
 - Matching remains an issue
 - Major advances in growing field of computational linguistics
- Remote editing becomes a reality
 - Cottage labor
- Computer-aided editing recognizes human contribution
 - Information overload is real; concise, intelligent content has value
 - Simply having “the most stuff” is no longer valuable



Real-Time and Real Savings

- Data used to be held centrally for reasons of space; now it's held centrally for reasons of time
 - Centrally maintained data inherently fresher than distributed data
- Centralized data repositories set the stage for centralized software applications
 - ASP model is worth watching
- Centralized databases eliminate many publisher production and fulfillment issues
 - It's e-commerce time
 - Product delivery is now essentially free
- E-mail as an update mechanism
 - Free, fast, responsive (for now)
- The Holy Grail of lister self-updating

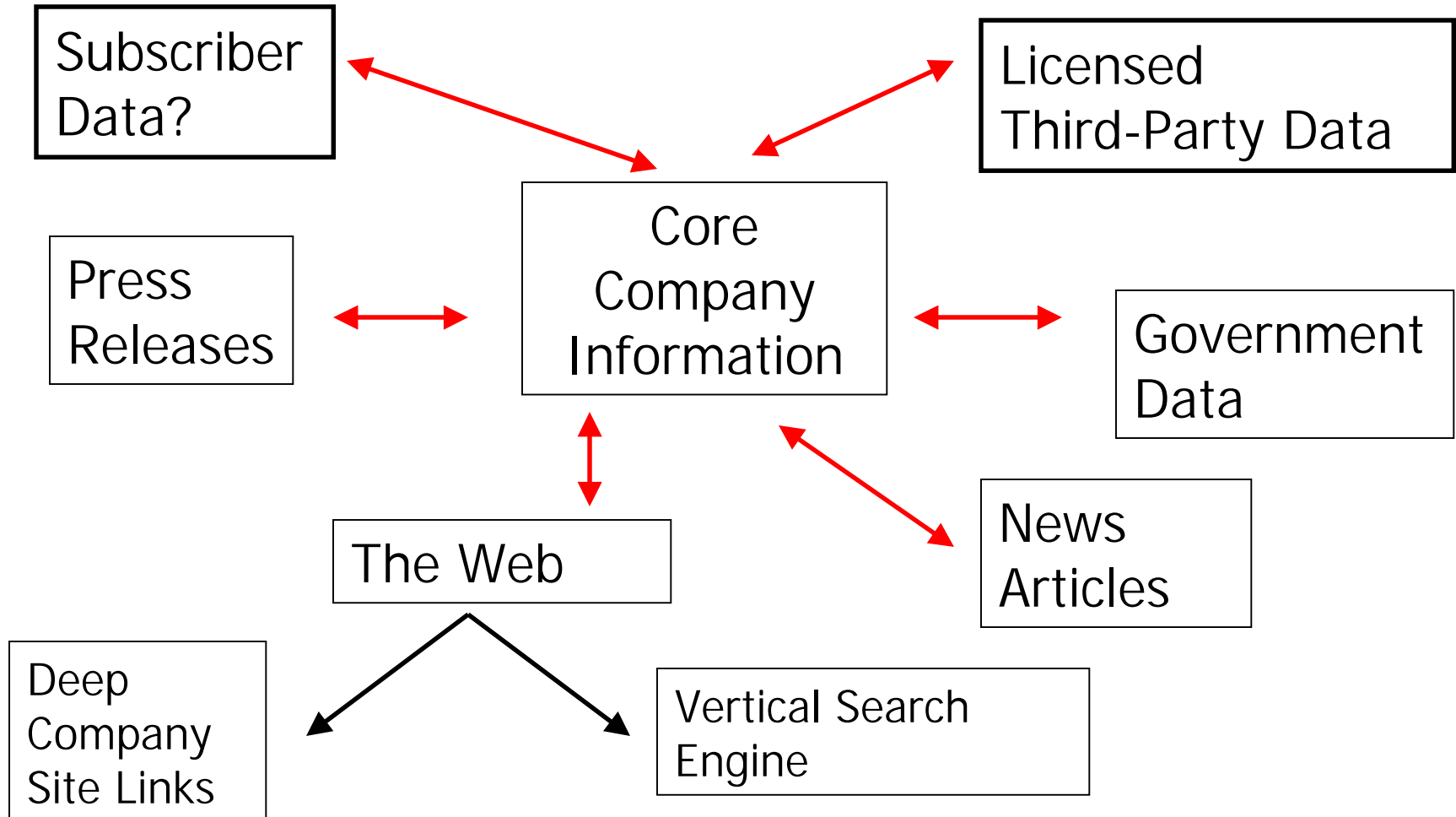


Data Augmentation

- Data overlays are easier than ever before
 - Add depth to your data
 - Add value to your product
 - Generally inexpensive
- Deep links to company Web sites
 - Significant added value in time saving and convenience
 - Leverages “source maintenance of data” trend
- Data-Text Integration
 - Linking full-text information to fielded content is the next big thing
 - Common for public companies; rare for private companies



Integrated Data: Can you say "portal"?



Hubs, Marketplaces and Exchanges

- Interconnected systems that automate BTB buying and selling
 - EDI meets the Internet
 - Computers buying from computers
 - Hold the promise of huge savings in procurement costs
- A significant threat to buying guide publishers
 - Real-time and transactional
 - Need for product/SKU level data
- A significant opportunity for many buying guide publishers
 - Neutrality is needed
 - Company/product data is needed
- Advertisers now asking “where do I put my ads?”



More Ways to Sell

- A la carte delivery is a reality
 - Customers get exact data they need in the format they need
 - Highly automated
 - Taps the “casual user” market
- Site and enterprise licensing deals are simplified
 - Technology issues removed from sales process
 - Number of prospects grows as more companies deploy Intranets
- Growing number of distribution outlets
 - Licensed free distribution; third-party resellers; lots of models
- Strong personalization/customization capabilities
 - Directory publishers have long known that customers will pay more for less data – if it’s the exact data they want



Business Process Integration

- Become one with your customers – at least with their software
- The Internet enables you to provide a continuous feed of data into actual software applications of your customers
 - Applications throughout the enterprise
- Creates “data dependence”
 - High value application permits premium pricing
 - Huge switching costs – a customer for life
- Opportunity for two-way flow of information
 - Cost-effective way to verify and update your data
- Garbage In, Garbage Out becomes Garbage In, Litigation Out
 - Data quality takes on new importance



The common theme underlying all these technological developments is connectivity.

The Internet is connecting all computers and all the programs that run on these computers.

To remain viable, directory publishers must make sure that their products acknowledge, embrace and leverage this connectivity.

