

## *IBM Lotus Connections software demo*

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This is Charlie, the top financial adviser at Growth Portfolio Investors.

Ask Charlie's peers and clients, and they'd say he's a hard worker with innovative ideas, and contacts and loyal clients all over the world. And he always has the right answer.

Ask Charlie, and he'd say it's about working *smart*, and building your professional network, fast.

He'd also admit that doing his job well has gotten faster and easier—things like networking, collaborating with experts and finding information.

So what's Charlie's secret to success? What makes him so productive and knowledgeable?

Let's find out.

Yesterday, Charlie worked late—researching, developing plans, building relationships and trying to stay organized. It wasn't easy.

One day Charlie's best client asked what investments he'd recommend in the alternative energy industry.

Charlie was unfamiliar with this field, so he left phone messages for colleagues and waited for answers.

He also spent hours looking for information on the Internet and trying to set up meetings.

Meanwhile, he missed a presentation deadline for a seminar.

After several days, Charlie found an expert who had just been hired. After they talked, Charlie finally had some suggestions for his client.

But his client had already gotten advice from another financial firm ...

and even implied that the competing firm should handle *all* of his investments.

Charlie knew there must be a better way.

Charlie found a better way to be productive, stay organized and find the information and people he needed with IBM Lotus Connections.

It's the first social software designed specifically for business, delivering five key components for an integrated Web 2.0 user experience.

Plus, the software can be used with the e-mail, instant messaging and portal software that you may already have.

Charlie has a lot to do in the next two days. He needs to develop several seminars and an investment plan for a new client who's interested in biotechnology.

Using the activities component, Charlie can organize his work, manage projects and collaborate with his expanding network of experts. Since the investment plan is a priority, he's created an activity to get things moving, fast!

Using profiles, the software's locator component, Charlie can quickly find people with the knowledge or strategic business relationships he needs to complete the plan by searching on name, skill, past projects or job title.

He types in *biotech* and sees a list of colleagues.

He clicks on Wendy, a senior adviser in the company's London office. Wendy's profile includes her contact information and reporting structure details, along with links to her blogs, communities, activities and bookmarks.

He clicks on one of Wendy's blogs to learn more.

She's written a report that Charlie wants to read later, so he uses the Dogear component to tag and bookmark the page.

He also discovers that a community she's active in is holding a meeting next week.

Charlie then adds Wendy to the investment plan activity, so she can see what's been done so far and contribute her expertise.

In the end, Charlie's client was very happy with the innovative investment plan that was delivered—faster than expected.

IBM Lotus Connections is now used by the clients of Growth Portfolio Investors as a way to build communities around different investment issues and topics.

Charlie and other employees can participate in communities—sharing information and getting feedback on customer issues.

Now Charlie and his colleagues can have stronger relationships with their clients and can react more quickly to new customer requirements

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Plus, they can expand their networks to include partners and experts outside the organization—allowing them to expand their knowledge and execute projects faster.