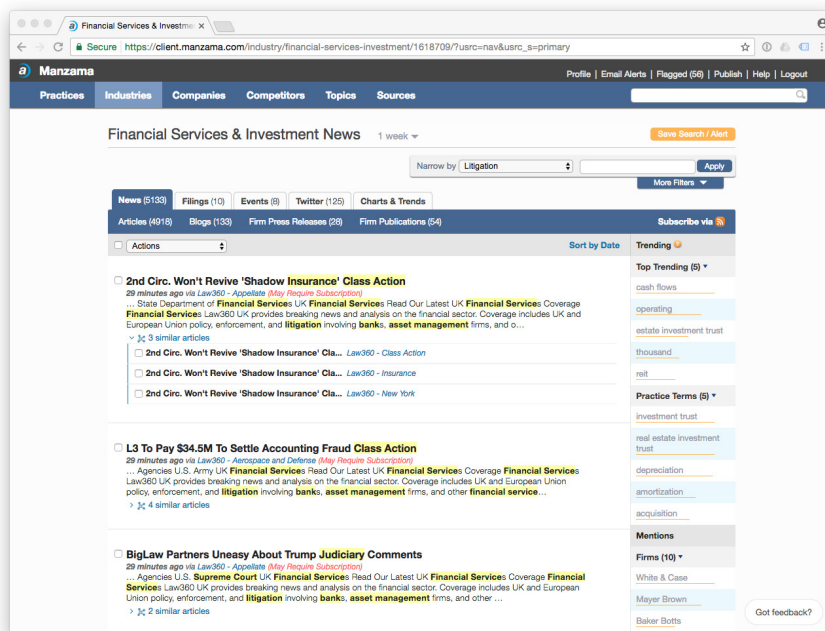


# Case Study

## Boutique Firm Tracks Complex Litigations with Manzama

Many NLJ 250 law firms have been adopting listening platform technology in the last few years, primarily as a tool for staying up-to-date around the activities that might impact their clients. Given the scope of these firms' practices and their hundreds of clients, it's hard to imagine how they could possibly keep pace with business and competitive intelligence without such a tool.

Yet listening platforms are not merely for mega-firms. Solo practitioners and boutique firms also benefit from being kept well-informed about their clients and prospects—a task Listening Platforms can achieve with a minimal use of human resources. Smaller firms also use listening platforms to stay abreast of developments in the practice of law. The platforms can be set up to scour practice-area specific blogs, Twitter feeds, and other online content so users can stay up to speed on new developments in their practice areas; monitor breaking news in client industries; identify new client opportunities; and emerging trends. Practitioners from defense firms can track plaintiff firms joining a given case and analyze a firm's past tactics...and vice versa.



“My practice involves financial services litigation, mostly for defendants,” said Amir Tadjedin, a partner with Markun Zusman, in the firm’s Portland office. “I need to be aware of what’s being said about any of the litigation matters which could or do affect our firm’s clients.”



Markun Zusman is a west coast firm with a nationwide practice. The firm’s 13 attorneys – working from offices in Los Angeles, San Francisco and Portland – represent clients ranging from individuals to major financial institutions. MZFC strives to provide clients with intelligent and aggressive representation, while controlling costs. The firm’s practice areas include:

**Trial Advocacy** – representing plaintiffs and defendants in trials in state and federal court and in arbitrations before the NYSE and FINRA.

**Securities Litigation** – representing broker-dealer firms and financial services professionals in arbitrations and litigation.

**Employment Litigation** – representing clients in claims for misappropriation of trade secrets, discrimination, breach of employment agreements, and partnership disputes.

**ERISA Litigation** – defending financial services professionals, including securities brokers and broker-dealers, investment advisors, insurance agents, pension plan administrators, third-party administrators, actuaries, and accountants in benefits and fiduciary duty claims under ERISA.

**Class Actions** – defending broker-dealers in class and mass actions involving registration, due diligence, and securities fraud claims.

**Regulatory Investigations** – counseling registered representatives, financial planners, and investment advisors who are being investigated by regulatory agencies.

**Litigation Prevention** – counseling broker-dealer clients and financial services professionals in litigation prevention.

## Manzama – A Powerful Intelligence Tool

Manzama is a web-based content intelligence platform that automatically scours the web for information based on a user's personal preference. It analyzes and classifies this information for relevance and importance, and delivers on-point information to each stakeholder across the organization, based on what each individual needs to know. It gives users a knowledge advantage, and makes the process of finding insights easy. Tens of thousands of users globally rely on Manzama to:

- ▶ Increase Thought Leadership and Content Marketing Initiatives – Track issues and other topics of interest to your clients. Help promote your lawyers and your firm as thought leaders by easily finding and sharing interesting and relevant content via email, newsletters, blogs, events and other thought leadership initiatives.
- ▶ Understand a Client's Business – Easily monitor clients to better understand developments around their business and help gain their trust.
- ▶ Stay on Top of Emerging Issues & Topics – With Manzama, you will not only be in the know on a range of different issues and topics that you need to stay updated on, you will be the first to know.
- ▶ Build a Better Understanding of Client Industries – Manzama helps you better understand trends and risks by industry, and enables you to proactively reach out to clients with advice creating new opportunities.
- ▶ Identify New Client Opportunities – Locate online intelligence that can lead to a new engagement with a current client or a prospect.
- ▶ Track New Developments in Key Practice Areas – Manzama performs robust automated searches to help you quickly zero in on emerging trends and developments within key areas of your practice.



"I use Manzama to follow litigation developments, issues affecting sponsors of investments our clients sold, and matters which relate directly to, or actually mention, our clients," Tadjedin commented. "These might take the form of press releases issued by plaintiff firms or FINRA (Financial Industry Regulatory Authority) about the investment product in question in one of our cases. I can likewise track what's happening in ancillary litigations that have the potential to impact cases that I'm involved with. I also use Manzama to track regulatory trends and investigation enforcement actions."

"I've told friends at other small and boutique firms that they should be using Manzama. You tell the application what you want to know, and important information automatically comes to you based on those parameters. It's an incredible resource for me, and keeps me informed about things I care about. On a typical work morning I get up, get my coffee and check my Manzama updates on my iPad or Smartphone. That's how I start the day."

To arrange a demonstration, please call 541-306-3271 or visit [www.Manzama.com/request-a-demo/](http://www.Manzama.com/request-a-demo/)