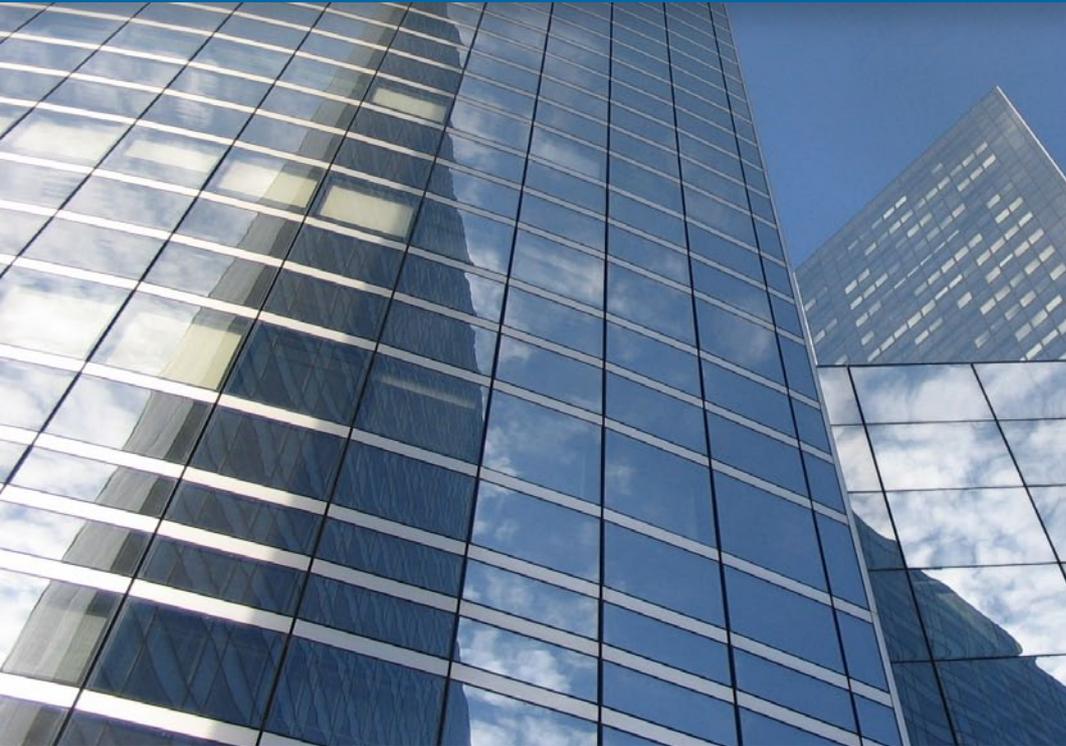


Natixis Private Equity turns to Exalead CloudView to create a new 360-degree client application



Business Challenge

- Simplify and expedite information search and retrieval
- Increase knowledge sharing and reuse
- Efficiently process large volumes of data (15 million documents)
- Comply with strict security requirements
- Evolve as information access needs change
- Minimize and control total cost of ownership (TCO)

Solution Benefits

- Intelligent, adaptable interface providing a unified vision of information despite heterogeneous content, formats and silos
- Native connectors for easy integration
- Rapid, high quality indexation
- Search results displayed in less than a second
- Minimal footprint and low cost scaling for optimal TCO

About Natixis Private Equity

Natixis Private Equity (NPE) is a subsidiary of Natixis, a corporate and investment bank owned by France's second largest banking group, BCPE. NPE is the leading provider of private equity services in France for SMBs (businesses valued from €50 to €500 million). NPE is also a leading private equity player in Europe and one with a rising profile in the high potential markets of Asia, South America and India. NPE is present in all areas of private equity: venture capital, expansion capital, buy-out/buy-in capital, and a recently created "Funds of funds" offering designed to respond to the needs of institutional investors. NPE's 300 employees are organized into 20 teams in 10 countries, and manage a €4billion portfolio of 695 investments.

<http://www.natixis-pe.com>



Unified information access improves decision-making at Natixis Private Equity

Context and Objectives

To accurately assess the risks and opportunities associated with capital investments, private equity professionals need both a deep understanding of the markets they serve as well as perfect visibility into the companies in which they currently or may potentially invest. Over the years, Natixis Private Equity (NPE), the leading French capital investment firm dedicated to small and medium-businesses, has amassed and continues to amass a tremendous amount of intelligence about the enterprises and markets in which they invest. It's a body of knowledge that contains answers to the common questions analysts pose: What's happening in this sector? What's press saying about this company? Who has management contacts there? What prior interactions have we had with this business?

However teasing out these answers against a huge volume of data dispersed across numerous systems has been a formidable challenge. The answers an analyst needs may be in the company CRM, current email exchanges or email archives, investment reports, newspaper clippings, etc. In addition to CRM records, NPE possesses a document collection of nearly 15 million items (2.2 million documents, 1.5 million active e-mails, 10 million archived e-mails, and 120,000 press articles). In short, NPE analysts have always had a tremendous amount of information they could leverage to aid decision making, but it was neither easily accessible nor coherently organized.

Therefore, in 2007, NPE decided to create a new company portal constructed around a search engine. The objective was to simplify information search and extract maximize value from the company's information assets—without comprising security. In essence, each of NPE's 20 international teams needed a secure sandbox around their confidential data.

Selection Criteria

In 2007, Natixis Private Equity assembled a project team of knowledge management and information technology professionals to determine their information access needs and compare available solutions. In this first phase, NPE chose to deploy a custom interface built upon the Autonomy platform.

Once this first search engine had been integrated and configured within a new SharePoint portal, users immediately began to request modifications to the search interface and organization of results. For example, they found the number of results returned to be insufficient, and they expected a more intuitive, Web-style interface for navigating results. Each modification undertaken, even seemingly minor ones, turned out to be time consuming and expensive.

By mid-2009, the project team issued a report on the effectiveness of the deployment. They found that the organization and management of data were not sufficiently adapted to NPE's needs, and that the custom-built interface was not flexible enough to accommodate necessary changes. Complicating the team's efforts further was the lack of local support on behalf of the search vendor.

Accordingly, at the end of July 2009, the project team decided to abandon the current solution and began again at square one. This time, they decided to take a bottom up approach, elevating functionality to the top of the requirements list and placing end users' needs, habits and expectations at the heart of their planning. The goal was to find a solution that would give employees quick and easy access to the data they needed to make smart decisions and attract and retain customers, and one that could be easily adapted to evolving needs. This time, the team chose Exalead CloudView.

The Exalead Choice

Brice Delons, CIO at Natixis Private Equity, states that the team found exactly what they were looking for in Exalead CloudView:

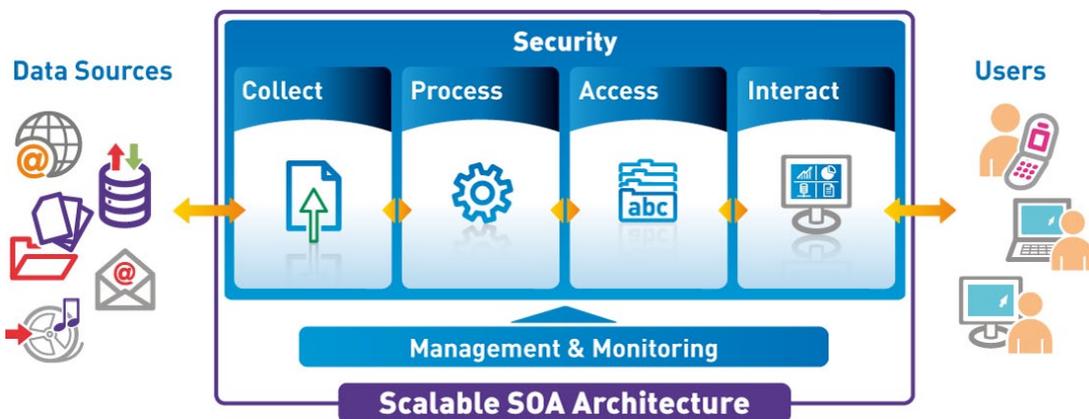
"This plug-and-play solution offers an ingenious interface that perfectly meets our needs to provide coherent access to our documentary resources." Beyond the tool's power and flexibility, Brice Delons and his team were impressed by the Exalead consulting team's understanding of NPE's business challenges. "We gained a better understanding of our users needs and priorities from our first attempt at search integration, and Exalead understood these needs and even steered us toward approaches and options we hadn't considered," notes Mr. Delons. For example, NPE could have deployed four servers in order to match the ¼ second query processing of a Web search engine, but they could deliver results in one second using just one server – a performance altogether acceptable to end users. They were therefore able to achieve a significant cost savings without compromising on functionality.

Exalead and Natixis Private Equity also shared the belief that a search engine deployed at the heart of an enterprise should deliver real added value to end users. The teams therefore worked together to optimize the methods of navigating results and refining searches and to expand the reach of the platform to additional knowledge resources.

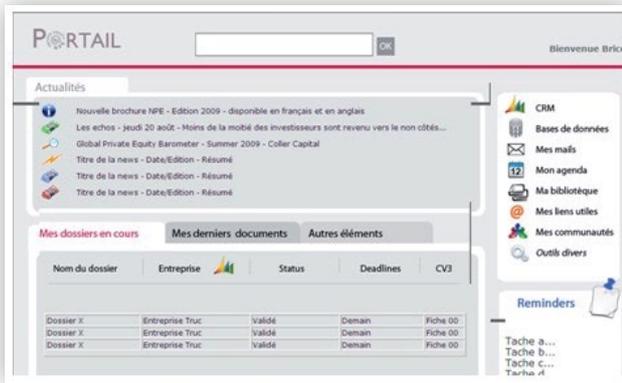
Deployment

In just five days, the teams were able to deploy a prototype of the new solution, with the out-of-the-box interface delivering an immediately satisfying user experience. Fine tuning the new solution was simple using CloudView's WYSIWYG configuration and management console. Beginning from the perspective that users understand the essential nature and content of the information they are seeking, the platform was configured to give users were a choice of conducting a global information search, or searching one of five basic conceptual repositories: documents, contacts, companies, dossiers, and organizations. At the same time, users could navigate results by dynamic categories such as market sector, information source, language, etc. These configurations were set in just a few clicks, enabling the team to get the tool into the hands of the users very quickly. The speed of deployment was greatly aided by the extensive range of native connectors available with CloudView (most notably Exchange and XML). Through this connector framework, resources could be integrated into the search utility without any special programming or modifications to source applications.

"The integrated XML connector in particular enabled us to index numerous applications, giving our users a more comprehensive and relevant vision of information," said Brice Delons. The search engine portal now delivers unified access across all of NPE's CRM applications, messaging systems, EDM (Electronic Document Management) systems, file servers, media and press collections, and email archives. What's more, only about three weeks of functional assistance were required to enable NPE to progress from the first prototype to this richly refined deployment.



Exalead CloudView Platform



CloudView enables the rapid development of customizable dashboards for sales, marketing and service

The Results

Natixis Private Equity users now benefit from a single point of access to all pertinent information. The portal personalized by the project team – and soon by the users themselves – offers a solution that is as intuitive and natural as Web search, yet conforms to the special knowledge universe and business needs of NPE in terms of search strategies, search refinement and information discovery. Once users have located information of interest, they can simply click through to corresponding data in the source application (an email in Microsoft Outlook, a record in the Microsoft Dynamics CRM, a document of a file server, etc.).

Although it's too early to quantify the ROI from the new search engine portal, Brice Delons, CIO at Natixis Private Equity, is confident that CloudView solution has delivered a breakthrough improvement in the day-to-day work processes of NPE staff. "We wanted to build a model that would work for us now and in the future. Exalead CloudView fulfills this need with an agile solution for accessing and exploiting information that adds real value to our business today, and better equips us to meet tomorrow's information challenges."

Results At-a-Glance

Business Challenges

- Significant financial risks: the effectiveness of investment decisions depends upon the quality and completeness of available information
- Difficulty in collaboration: encouraging collaboration is difficult with a staff dispersed across 20 international teams
- Workplace inefficiencies: difficulty in locating resources lowers productivity and leads to a high level of duplicated work
- Overcoming negative perceptions of search due to the slow deployment, difficulties in configuration and management, and low adoption by users associated with the initial Autonomy implementation

The Exalead Choice

- A simple yet robust solution that delivers a 360° vision of each customer "out-of-the-box"
- A tool for fully capitalizing information assets while respecting security constraints
- A relationship of trust between Exalead and Natixis Private Equity

What's Next

- Continuing refinement of the portal and training to permit users to exploit the full depth and range of functionality within the new solution
- Continued expansion of the range of data sources indexed, and continued fine tuning of relevance according to business needs



Contact us to discover for yourself why Exalead is the right search platform to work with your structured and unstructured information.

Visit www.exalead.com to learn more.

About Exalead

- E.U. Headquarters, Paris, France - U.S. Headquarters, San Francisco, CA
- Offices in 7 countries
- 250+ customers worldwide
- Founded in 2000 by AltaVista executives

Exalead is a division of Dassault Systèmes, whose 9000 employees and 6000 partners provide 3D based applications, PLM based applications, and Search based applications to more than 115,000 customers in 80 countries.

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