

# Robert J. Sherwood & Associates

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Robert J. Sherwood & Associates (“RJSA”) specializes in serving high technology companies. Its principals have over 30 years of successful experience in forming, managing and consulting with technology companies. RJSA clients have included start-ups, venture capital backed businesses and corporations with more than \$5 billion in annual sales. RJSA principals have directed more than 50 seminars to more than 2,500 corporations on business intelligence and topics related to business on the Internet.

RJSA has significant hands-on experience in designing, developing and operating commerce web sites. They have launched multiple web sites with commerce capability, and have provided consulting services to firms with more than 200 operating web sites. These sites have used a variety of server configurations and hosting arrangements as well as custom developed and commercial commerce transaction processing software. They have evaluated various business models for generating revenue from commerce sites, including transaction, ad, and content based models as well as permission based email marketing programs targeted to opt-in email lists.

RJSA offers consulting services in the following specific areas:

1. Capital formation services
2. Competitive intelligence data gathering systems
3. Commerce strategy and implementation planning
4. Litigation support services
5. Technology protection services
6. Web site analysis and management information systems
7. Web site affiliate marketing program design and implementation

Following is a brief description of the services we provide in each area.

## **Capital Formation Services**

Early stage development companies and more established companies seeking to fund product development typically require additional equity capital to achieve their objectives. RJSA principals are experienced in helping companies develop appropriate strategies and business plans for capital formation purposes. RJSA can also provide assistance in distributing the business plan to the investor community and conducting informational meetings with prospective investors. RJSA’s objective is to identify qualified investors who are willing and able to provide the required capital, at which point company executives and their legal counsel negotiate terms of the funding.

## **Competitive intelligence data gathering systems**

Competitive intelligence (CI) data gathering is an important component of commerce strategy, and RJSA has developed systems and procedures for implementing an effective CI program using standard off-the-shelf software. The CI services offered by RJSA include:

1. Formulation of CI objectives and strategy
2. Identification of CI participants, which may include employees, suppliers, outside sales representatives, and other stakeholders who are in a position to gather pertinent information about competitors.

## **Commerce strategy and implementation planning**

This service is typically provided for companies that wish to implement a commerce strategy and are in the formative stage of developing the strategy. RJSA services in this area include:

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1. Defining an appropriate commerce strategy and business model based on the company's objectives
2. Designing an effective implementation plan for the launch and ongoing development of commerce strategy

Implementation plans typically include web site design and development, market analysis and competitive intelligence gathering, marketing strategy and management information systems for monitoring implementation progress and evaluating the effectiveness of marketing strategy.

## **Litigation support services**

RJSA principals have substantial experience in providing litigation support services in legal proceedings involving technology companies, equity disputes, intellectual property matters, business valuations, investment due diligence reports or technology related issues. Such services include, but are not limited to, advice on discovery strategy and activities, analysis of business impact and assessment of damages, financial analysis and pro forma financial statement preparation, and expert witness testimony. RJSA litigation support services are always provided in conjunction with and in support of client's legal counsel.

## **Technology protection services**

Any company that is engaged in developing proprietary technology of any kind, be it software, hardware, or management processes, must take steps to protect that technology from unauthorized disclosure or theft and provide an effective means for invention disclosure and patent filings. RJSA can assist in development and implementation of a comprehensive technology protection program that will provide the maximum protection allowable under current United States and international patent laws. The program will be tailored to suit the particular needs and circumstances of the client, and typically includes the following key components.

1. General policy and applicability
2. Responsibilities of the Company
3. Responsibilities of Company personnel
4. Incentive for inventors
5. Disclosure policies
6. Invention disclosure checklist
7. Intellectual property disclosure form
8. Confidentiality agreement

## **Web site affiliate marketing program design and implementation**

Many successful commerce firms have successfully implemented web site affiliate marketing programs whereby the products and services of the "selling" firm are advertised on the web site of several other "affiliate" firms with hyperlinks from the affiliate sites to the selling site. Such programs typically require the selling firm to pay the affiliate firms a commission on all sales made to parties who click through from the affiliate web site. The commission is typically a predetermined percentage of net sales, i.e. gross sales less returns and credit card chargebacks.

- RJSA services in this important area of commerce marketing include the following
- Design of the affiliate marketing program
  - Identification of prospective affiliate web sites using "web crawler" software tools
  - Develop an affiliate solicitation program via sophisticated email techniques
  - Implementation of the affiliate solicitation program and signing up affiliates
  - Training client personnel on how to expand and maintain the affiliate program

## **Web site analysis and management information systems**

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A commerce web site is not complete if it does not have the capability to continuously gather statistical data and analyze the data to produce useful management information. Software designed to gather web site statistical data is commercially available, but this software is not designed to perform user-defined analysis of the data for production of management reports. RJSA has developed a set of procedures to take the voluminous data produced by popular web site statistics software and turn it into useful management information. The RJSA client can implement these procedures on their own after receiving training or RJSA can develop a turnkey system custom designed for the client. These procedures involve special software to read and store the web site statistics in a database that can then be accessed for analysis and reporting.

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