Leveraging Library Resources for your Business Plan

Meghan Dolan
February 2, 2012
1. Provide a **strategy** in planning your research.

2. Help you think about which **questions** to ask in probing your topic.

3. Highlight extensive **resources** available to you to answer these questions.
Research Strategy Overview

- Background
- Industry information
- Company Information /Identify competitors
- Country Information/Demographic Data
- Market Research
- Build your Network
- After the Contest...
Baker Library website - http://www.library.hbs.edu/
Baker Library website – Research guides
Background: Getting Started

Factiva: http://www.library.hbs.edu/go/factiva.html
- News articles from over 10,000 publications
- Global in coverage
- Original language content

Business Source Complete: http://www.library.hbs.edu/go/buscomplete.html
- Extensive full-text of articles
- Full archive of the Harvard Business Review
- Wide variety of current industry and market research reports

ABI/ProQuest: http://www.library.hbs.edu/go/ABI.html
- Extensive full-text of articles
- Business Monitor International (BMI) industry reports
Background: Factiva

http://www.library.hbs.edu/go/factiva.html
Background: Business Source Complete

http://www.library.hbs.edu/go/buscomplete.html
Background: ABI

http://www.library.hbs.edu/go/ABI.html
Background: Additional Resources

Research Guides: http://www.library.hbs.edu/guides/
- Subject specific guides that highlight best resources
- Often include news feeds from industry publications
- Many contain a Google Custom Search feature that allows you to search within the guide

and Books!!

HOLLIS catalog: http://discovery.lib.harvard.edu/
- Search for print books, journals and newspapers
- Can limit your search to the Baker Library
Background: HOLLIS catalog
Industry Information

- industry trends
- how the industry is organized
- how to analyze a company within the industry

Thomson ONE: http://www.library.hbs.edu/go/thomsonbanker.html
- reports from investment banks and investment research firms
- **no charge** for reports
- only works with Internet Explorer

**Company, Industry & Career Research Guide**
- great overview of library resources for company and industry research
- provides information on how to access Datamonitor industry reports
Industry Information: S&P NetAdvantage
Industry Information: Thomson ONE
Company Information

Capital IQ
http://www.library.hbs.edu/go/capitaliq.html
- Public and private company data, investment firms, capital transactions
- Build lists of companies by self-defined criteria
- Requires an account; may take 2-3 days to set up account

OneSource
http://www.library.hbs.edu/go/onesource.html
- Includes company profiles, company and industry news and analysis
- Build lists of companies by self-defined criteria
Company Information: Capital IQ
EIU Suite of Databases:
The Economist Intelligence Unit (EIU) suite of databases includes:

- City Data- pricing information on products and services (see “Data Tools” link)
- Country Commerce- business regulations, operating conditions, etc.
- Country Finance- analysis of financial systems
- Risk Briefing- risk factors in 150 markets

IMF eLibrary:
The International Monetary Fund (IMF) suite of databases includes:

- International Financial Statistics- exchange rates, money supply, commodities
- Balance of Payment Statistics- balance of payments, international investments
- Direction of Trade Statistics- value of imports and exports

Provides measures of business regulations and their enforcement
Country Information /Demographic Data

CountryData.com:
http://www.library.hbs.edu/go/countrydata.html
Risk rating characteristics including government stability, exchange rate stability, conflict, and investment.

Standard & Poor’s Ratings Direct:
http://www.library.hbs.edu/go/ratingsdirect.html
Analysis of debt issues including sovereign debt.

IMD World Competitiveness Yearbook:
http://www.library.hbs.edu/go/imd.html
Analyzes and ranks the ability of nations to create and maintain a competitive environment. Contains cross-country and regional comparisons.
Country Information /Demographic Data: IMD
Global reports published by IGO’s/NGO’s

*Global Competitiveness Report, Global Information Technology Report, Human Development Report, Global Corruption Report, Global Financial Stability Report* (see the [Country & International Research Guide](http://www.library.hbs.edu/go/wdi.html) for access to these reports)

World Development Indicators: [http://www.library.hbs.edu/go/wdi.html](http://www.library.hbs.edu/go/wdi.html)
Statistics for almost 600 development indicators (including public health, environment, education, and labor force) dating as far back as 1960.

A list of links to national statistical agencies. This website is a good access point for country-specific social and economic indicators, including national census data.
International Statistical Agencies

- Afghanistan [Central Statistics Office](https://www.stat.gov.af)
- Albania [Institute of Statistics](https://www.stat.gov.al)
- Algeria [National Office of Statistics](https://www.ofas.gouv.dz)
- Andorra [Department of Studies and Statistics](https://www.dia.dg)
- Anguilla [Statistics Unit](https://www.stat.gov.ag)
- Antigua and Barbuda [Reports and Statistics](https://wwwStats.gov.ag)
- Argentina [National Institute of Statistics and Censuses](https://www.inegi.gob.ar)
- Armenia [National Statistical Service](https://www.stat.am)
- Aruba [Central Bureau of Statistics](https://www.stat.gov.ar)
- Austria [Central Statistical Office](https://www.statistik.at)
- Azerbaijan [State Statistical Committee](https://www.stat.gov.az)
- Bahamas [The Department of Statistics](https://www.bahamas.gov.bs/statistics)
Market Research.com Academic:
http://www.library.hbs.edu/go/marketresearch.html
- Great source for market research reports for the life sciences, consumer goods, technology and energy sectors.

Global Market Information Database:
http://www.library.hbs.edu/go/gmid.html
- Published by Euromonitor
- In-depth, global coverage of consumer products and industries
- Use the “Search” tab at the top of the page, select “Advanced Text”

Analyst & Research Reports databases
- lists all market research databases available via Baker (including eMarketer)
- descriptions highlight strengths of each database
Build Your Network

HBS Alumni Navigator:
http://apps.alumni.hbs.edu/navigator
- contact information for HBS alumni around the world
- HBS alumni directory searchable by country, industry and position

Capital IQ:
http://www.library.hbs.edu/go/capitaliq.html
- build lists of companies by industry and geography
- include “Education” section that will allow you to identify HBS alums
After the Contest: Thomson ONE
After the Contest: Thomson ONE
After the Contest: Thomson ONE

Firm Type

Available Items:
- Angel Group
- Bank Affiliated
- Corporate PE/Venture
- Endowment, Foundation or Pension Fund
- Government Affiliated Program
- Incubator/Development Program
- Individuals
- Insurance Firm Affiliate
- Investment Management Firm
- Private Equity Advisor or Fund of Funds
- Private Equity Firm
- SBIC
- Service Provider

Selected Items:

Ctrl-click to select multiple items.

Add All

Add

Remove

Remove All

Included in results

Excluded from results

Ok

Cancel
After the Contest: Thomson ONE

Thomson ONE

- Fund Location
- Fund Stage
- Fund Industry Focus
- Fund Status
- Fund Investor Type
- Fund Size (MM)
- Fund Size Target (MM)
- Total Equity Invested by Fund (MM)
- Total Number of Companies Invested In

Executive Details
- Executive Name
- Executive Title

Generate Results
After the Contest: Thomson ONE

![Thomson ONE screenshot]

### Firm Search Result

**Select Output:** Complete Profile

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm Type</th>
<th>Capital Under Management (USD M)</th>
<th>No. of Funds Managed</th>
<th>Total Number of Companies Invested</th>
</tr>
</thead>
<tbody>
<tr>
<td>21st Century Health Ventures</td>
<td>Private Equity Firm</td>
<td>100.00</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>SAV Ventures</td>
<td>Private Equity Firm</td>
<td>415.00</td>
<td>4</td>
<td>29</td>
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<tr>
<td>Acute Medical Ventures</td>
<td>Private Equity Firm</td>
<td>230.00</td>
<td>3</td>
<td>21</td>
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<tr>
<td>Affinity Capital Management</td>
<td>Private Equity Firm</td>
<td>161.00</td>
<td>6</td>
<td>52</td>
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<tr>
<td>Alist Co.</td>
<td>Private Equity Firm</td>
<td>60.00</td>
<td>2</td>
<td>35</td>
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<td>Alistar Capital Group</td>
<td>Private Equity Firm</td>
<td>-</td>
<td>1</td>
<td>1</td>
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<td>Altasia Capital Partners LLC</td>
<td>Private Equity Firm</td>
<td>500.00</td>
<td>2</td>
<td>5</td>
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<tr>
<td>Aperture Venture Partners, LLC</td>
<td>Private Equity Firm</td>
<td>3.00</td>
<td>3</td>
<td>10</td>
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<tr>
<td>Aphelion Capital, LLC</td>
<td>Private Equity Firm</td>
<td>-</td>
<td>1</td>
<td>7</td>
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</tbody>
</table>
### Firm Profile: 5AM Ventures

- **2200 Sand Hill Road**
- **Suite 110**
- **Menlo Park, California 94025**
- **United States**
- **Phone:** 650-233-6660
- **www.5amventures.com**

**Firm Status:** Actively seeking new investments
**Firm Type:** Private Equity Firm
**Founded:** 2002
**Affiliations:** National Venture Capital Association - USA (NVCA)
**Cap Under Mgmt:** USD $15.00 Ml (As Of 01/07/2010)

### Top Co-Investors

<table>
<thead>
<tr>
<th>Firm Name</th>
<th># of Companies</th>
<th># of Rounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Versant Ventures</td>
<td>10</td>
<td>22</td>
</tr>
<tr>
<td>Aravis SA</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>ARCH Venture Partners</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>GBS Venture Partners, Ltd.</td>
<td>4</td>
<td>11</td>
</tr>
<tr>
<td>CHEA Capital</td>
<td>6</td>
<td>8</td>
</tr>
</tbody>
</table>

### Direct Investments

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Industry</th>
<th>Last Investment Date</th>
<th>Still in Portfolio</th>
<th>Company Status</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anaphore, Inc.</td>
<td>Biotechnology</td>
<td>05/14/2009</td>
<td>Yes</td>
<td>Active</td>
<td>La Jolla, United States</td>
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<tr>
<td>Anaphore, Inc.</td>
<td>Biotechnology</td>
<td>05/29/2006</td>
<td>Yes</td>
<td>Active</td>
<td>La Jolla, United States</td>
</tr>
<tr>
<td>Igenics, Inc.</td>
<td>Biotechnology</td>
<td>04/20/2010</td>
<td>Yes</td>
<td>Active</td>
<td>Burlington, United States</td>
</tr>
<tr>
<td>Innterra Holdings, Inc.</td>
<td>Biotechnology</td>
<td>03/28/2007</td>
<td>Yes</td>
<td>Active</td>
<td>Clinton, United States</td>
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<tr>
<td>Iliaria, Inc.</td>
<td>Biotechnology</td>
<td>09/30/2005</td>
<td>Yes</td>
<td>Active</td>
<td>Clinton, United States</td>
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<tr>
<td>Innterra, Inc.</td>
<td>Biotechnology</td>
<td>03/31/2006</td>
<td>No</td>
<td>Acquisition</td>
<td>Santa Clara, United States</td>
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<tr>
<td>Innterra, Inc.</td>
<td>Biotechnology</td>
<td>12/22/2008</td>
<td>Yes</td>
<td>Active</td>
<td>South San Francisco, United States</td>
</tr>
</tbody>
</table>
After the Contest: Thomson ONE

**Company Profile: Anaphore, Inc.**

- 10931 North Torrey Pines Road, La Jolla, California 92037 United States
- Phone: 858-587-4815 | Fax: 858-587-4854 | [www.anaphoreinc.com](http://www.anaphoreinc.com)
- **YE Industry Code:** Other Therapeutic Proteins (incl. hormones & TPA) (4123)
- **SIC Code:** Pharmaceutical Preparations (3834)
- **NAIC:** Pharmaceutical Preparation Manufacturing (325412)

**Business Description:**
Develops protein therapeutics for cancer and immune-mediated diseases. The Company develops Atrimers, which are drug candidates engineered from a fully-human serum protein that is naturally secreted as a trimeric structure of approximately 60 kD monomers. Anaphore’s engineering platform, TrimerX, provides approaches to generate Atrimers.

**Key Facts**
- **Company Founded Date:** 01/01/2008
- **Company Status:** Active
- **Current Operating Stage:** Clinical Trials
- **PE Backed Status:** Currently PE/VC Backed
- **Total Funding to Date:** 36.00 USD Mil

**Investment Rounds**

<table>
<thead>
<tr>
<th>Date</th>
<th>Stage</th>
<th># of Inv</th>
<th>Deal Value (USD Mil)</th>
<th>Equity Amount (USD Mil)</th>
<th>PE Debt Amnt (USD Mil)</th>
<th>Company Valuation (USD Mil)</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/14/2009</td>
<td>Early</td>
<td>6</td>
<td>-</td>
<td>13.00</td>
<td>-</td>
<td>Not Disclosed</td>
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<tr>
<td>12/09/2008</td>
<td>Early</td>
<td>4</td>
<td>-</td>
<td>17.00</td>
<td>-</td>
<td>Not Disclosed</td>
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<tr>
<td>04/15/2008</td>
<td>Early</td>
<td>2</td>
<td>-</td>
<td>8.00</td>
<td>-</td>
<td>Not Disclosed</td>
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</tbody>
</table>

*Denotes the lead investor for the investment round

(ND): Not Disclosed
After the Contest: PitchBook
After the Contest: PitchBook
After the Contest: PitchBook
After the Contest: PitchBook
After the Contest: PitchBook

![PitchBook webpage](image-url)

**Investor and Fund Search Results**


<table>
<thead>
<tr>
<th>Investor Name</th>
<th>Last, Closed Fund Name</th>
<th>Total Investments</th>
<th>Active Investments</th>
<th>Investments in the last 6 months</th>
<th>Exits in the last 6 months</th>
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</thead>
<tbody>
<tr>
<td>Draper Fisher Jurvetson</td>
<td>Draper Fisher Jurvetson Fund X</td>
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<td>Kleiner Perkins Caufield &amp; Byers</td>
<td>KP Capital</td>
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<td>New Enterprise Associates</td>
<td>New Enterprise Associates ID</td>
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<td>RockPort Capital Partners</td>
<td>RockPort Capital Partners III</td>
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<td>Anthill Capital Partners</td>
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<td>GFI Energy Ventures</td>
<td>GFI Energy Ventures Power Opportunities Fund II</td>
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<td>Kehoe Ventures</td>
<td>Kehoe Ventures IV</td>
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<td>Kollberg Kravis Roberts</td>
<td>Kollberg Kravis Roberts</td>
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<td>RiverStone Holdings</td>
<td>RiverStone Holdings Global Energy and Power Fund</td>
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<td>Warburg Pincus</td>
<td>Warburg Pincus Private Equity X</td>
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<td>Denham Capital Management</td>
<td>Denham Commodity Partners Fund V</td>
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<td>Hudson Clean Energy Partners</td>
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<td>Energy Investor Funds</td>
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<td>Good Energies</td>
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<td>The Carlyle Group</td>
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<td>Angelo Group</td>
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<td>First Reserve</td>
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<td>Advanced Technology Ventures</td>
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<td>Bessemer Venture Partners</td>
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<td>Thinkergy Energy Management</td>
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</table>
**HBS and HU Database Tips**

Database **Passwords** “More Info” page will tell you if a resource needs an extra password or Harvard PIN; also searching tips, database trouble-shooting.

**No extra charge** for reports from our databases [i.e. Marketresearch.com and Thomson ONE analyst reports].

Always use database’s indexing and “**Advanced Search**” features.

Numerous **download formats** often available.

**Where did the information come from?** – feel free to **ask a librarian** about data sources.
Baker Library may not have exactly what you need...

- Harvard Medical School Library (Countway)
- Harvard Law School Library (Langdell)
- Harvard Kennedy School Library
- Cabot Science Library
Don’t Forget...

- **Rock Center Resources**
  [http://www.hbs.edu/entrepreneurship/resources/](http://www.hbs.edu/entrepreneurship/resources/)

- **Citation Guide for HBS Students**
  [http://www.library.hbs.edu/guides/citationguide.pdf](http://www.library.hbs.edu/guides/citationguide.pdf)

- **HBS Copyright and Licensing Policies**
  [http://www.library.hbs.edu/copyright_restrictions.html](http://www.library.hbs.edu/copyright_restrictions.html)

- **Additional Information for MBAs on Using Baker**
  [http://www.library.hbs.edu/resources_mba.html](http://www.library.hbs.edu/resources_mba.html)

- **Keep track of your sources**
  RefWorks or EndNote
We’re in the Business of Hope

In-Person Assistance:

Reference hours:
SUN: 12 pm – 7 pm; MON-THUR: 9am – 7pm; FRI: 9am – 5pm

Stamps Reading Room Quiet Study hours*:
SUN – THUR: 7pm – 12am; SAT: 12pm - 7pm

Drop by at your convenience: Please ask for reference librarian at the front desk
Phone: (617) 495-6040
Email: infoservices@hbs.edu
Request a consultation (email infoservices@hbs.edu): schedule an appointment for an in-depth research consultation with a reference librarian.

* Please Note: Reading Room hours vary during the summer and holidays, see “Baker Hours” at: http://www.library.hbs.edu/info/hours.html.