



In This Issue

The directory is coming! The directory is coming!

Board of Directors: 2003 candidates.

These seven deadly sins of intelligence professionals.

Business wargames.

SCIP Award nominations due Nov. 22.

Carpe Diem: one expert and why the Greeks liked Ulysses.

Handling those pesky vendors.

The gathering and internal dissemination of CI.

Finding the needle in a stack of needles: five finds from Dialog.

FYI: new and notable.

November 05, 2002

SCIP online has a new regular column by Bob Stewart that contains brief descriptions of and links to recently published CI-oriented articles. In July readers responded to a survey conducted by a SCIP student member, Jan Marin, and the article includes a summary of the research findings. Mark Chussil provides an overview of wargames, and the 'Seven Deadly Sins' series continues with a contribution by Mike Sandman.

Please note that SCIP online is available in HTML, plaintext, and PDF versions. Author, title, and subject indexes of all issues are on the SCIP website.

Bonnie Hohhof, Editor, bhohhof@scip.org

November 05, 2002

The directory is coming! The directory is coming!

SCIP is preparing to produce a new membership directory, to be available in January 2003 and we need your help. The directory will be free to all current members in a PDF format as either a downloadable file or on a CD-ROM. The directory is designed for easy printing of all or portions of the information. SCIP will provide "print-on-demand" copies of the directory at cost.

Only you can verify the accuracy of your listing that will be in the directory. Please visit the [directory site](#) and select "Update Your Profile" to check the accuracy of your "DIRECTORY" information. Up-to-date information makes the directory more valuable for everyone, so SCIP will send a few more reminders. Problems? [Email](#) changes or call the SCIP office at 703.739.0696.

November 05, 2002

Board of Directors: 2003 candidates.

SCIP Board of Directors-2003 candidates.

Voting for new members of the SCIP Board of Directors will be on-line this year, starting on December 12th and running through February 12th. Part of the on-line voting section will include the electronic versions of each candidate's biographical material, along with their thoughts on how they view SCIP, its needs moving forward, and their potential role if elected. Three board members will be elected this year.

Here are brief biographical snapshots of the 2003 candidates

Elizondo, Noe

- Consultant, Intelamex, Inc. Ottawa, Canada, with office in Mexico.
- Nominated by: Kim Chevalier, Jonathan Calof.
- SCIP membership: 5 years.
- Founder of SCIP Monterrey Chapter (first chapter in Latin America) - 1998; founder of SCIP Mexico, A.C. 1998; presenter at SCIP Annual Conference in 1999, 2000, 2002; contributor to CI Magazine.
- Professional involvement with CI since 1994, with 17 years in Mexican Foreign Affairs Ministry prior to 1994.

Giese, Diane

- Consultant, Strategy Software, Kirkland, Washington.
- Nominated by John Nolan, Steve Storms.
- SCIP membership: 4 years.
- Seattle Chapter steering committee; presentations at local and national level; annual conference planning committee (2001, 2002, 2003); articles in CIM Magazine; program chair for AMA Hot Topic Briefing on Competitive Affairs.
- 8 years of marketing and/or CI experience.

Klement, Joseph

- Consultant, Mc3 Intel, Toronto, Canada.
- Nominated by David Gibson, Enrico Codogno
- SCIP membership: 4 years.
- Active in Toronto Chapter; CI presentations at university.
- 4 years of experience in CI; Professional Engineer & Project Management Professional.

Michaeli, Rainer

- Consultant, Die Denkfabrik (The Thinkfactory), Butzbach, Germany.
- Nominated by: Anja Kober, Craig Fleisher.
- Nominated in 2001 and chosen to be on the 2001 slate.
- SCIP membership: 6 years.
- Chapter coordinator Rhein/Main area; European Conference Committee (2001, 2002); national and international presentations in US and Europe.
- 8 years experience

Schulz, Stephen

- Practitioner, Jostens, Inc. Minneapolis, Minnesota.
- Nominated by Judy Leavitt, Kathrine Hayes
- SCIP membership: 6 years.
- Minneapolis Chapter: secretary, agenda committee, membership committee; Presentations at annual conference (1999, 2002) and SMI conference (1999, 2000); published in CIM Magazine.
- 9 years experience as a practitioner.

Sullivan, Mark

- Practitioner, General Motors, Warren, Michigan
- Nominated by Ellen Naylor, Tim Kindler.
- SCIP membership: 11 years.
- Founding member of Detroit Chapter; Detroit Chapter Chair for 5 years; Regional Coordinator for Great Lakes Region; SCIP Mentor; authored articles for CI Review and CIM Magazine; presentations at the local level; 1998 Catalyst Award Winner.
- 20 years experience as a practitioner

November 05, 2002

These seven deadly sins of intelligence professionals.

These seven deadly sins of intelligence professionals.

Michael Sandman, Fuld and Company, msandman@fuld.com

Summary: There are (at least) two kinds of sins--sins of omission and sins of commission. Forgetting your significant other's birthday is a sin of omission; giving him or her a sweater that's too big is a sin of commission. Here Mike Sandman analyzes these seven deadly sins of intelligence professionals. If you turn all seven on their heads, you have these seven habits of long-lived CI professionals.

There are (at least) two kinds of sins--sins of omission and sins of commission. Forgetting your significant other's birthday is a sin of omission; giving him or her a sweater that's two sizes too large is a sin of commission. Here are the seven deadly sins of intelligence professionals:

1. Failing to learn about your own organization (as in omission).

The inscription on the Temple of the Oracle of Delphi in ancient Greece read: "Know thyself." The Oracle of Delphi predicted the future. You can't predict the competitive future unless you know how the players in the industry think and work. Knowing your own organization is the place to start.

Get out of your office and visit the operations areas of your company. Observe the scale of what's going on:

- How many people are there in the call center, the HR department, the R&D building?
- What technology tools do they use?
- What kinds of capital does your company have?
- How does a company in your industry buy, produce, distribute, and support its products and services?

Learn enough to answer the same questions about your own firm as you have about the competitor. Know thyself. (*Gnothi seauton* in Greek, in case you like to sound erudite.)

2. Jumping to conclusions (as in commission).

It's important to view single pieces of data or unverified reports as being no more than what they are--uncorroborated and therefore not a sound basis for a conclusion. Sometimes we try to stretch a fact or even a rumor because it leads us to the conclusion we prefer, or because we just don't have anything else to go on, or because it's really exciting.

Rumor: The CEO of General Motors was seen having lunch with the CEO of Wal-Mart.
Unsupported conclusion: Wal-Mart will acquire GM and start selling Bucks in all its stores.

Exciting, isn't it?

3. Assuming other companies have the same assumptions that yours does.

Organizations build their strategies on a foundation of assumptions about the marketplace and their own strengths. And they often have corporate taboos---beliefs held by top management that no one would dare to question.

Don't assume that others in your industry share your assumptions. If you want to understand *why* they have adopted a particular strategy or particular tactics as opposed to merely understanding *what* the strategy or tactics are, figure out what their assumptions are. (Read Ben Gilad's "Business Blindspots" if you want to understand more about this important problem.)

4. Failing to ask questions when you don't know something.

When you're the intelligence expert in your company, it's hard to admit that you don't know everything, but...you don't. If you're given an assignment you don't quite grasp, or if someone uses a term or an acronym you don't understand, ask questions.

We did an assignment years ago for Digital Equipment Corporation. The client said to our team, "We use a lot of TLAs around here. Do you people know what a TLA is?" Oh-oh. An acronym. One of the other team members started to nod in the affirmative, but I admitted ignorance. It turned out that the guy was testing us to see if we'd ask "What's a TLA, Bob?"

"ATLA is a three-letter acronym." (What a great company--they even had a TLA for TLAs.)

Always ask, even if you have to wait a bit and ask someone you won't be embarrassed to ask.

5. Doing it all yourself.

Trying to do it all yourself is a sure recipe for failure. You can't, precisely because you don't know everything. Get help from your colleagues. Find people in each key functional area to talk to about their specific areas of expertise. If they're mercenary salespeople you'll have to take them out to lunch, but if they're lonely engineers they'll take you. (Just kidding, just kidding.)

Equally important, don't try to do all the analysis yourself. Example: You have to analyze the 10-K reports of two companies. How many of you took a course in finance and accounting? How many of you enjoyed it? If you didn't raise your hand in response to that last question and you're putting together a financial analysis, ask someone in the CFO's office or the division controller's office to help you.

And don't stop with your own colleagues. Talk to trade journalists, industry consultants, people who've retired from the industry. Build a circle of sources and helpers. It takes time in the short run, but it will save you time and improve your work in the not-very-long run.

6. Failing to push back when the information you get doesn't make sense.

It's as into accepting something someone tells you if it doesn't make sense and you fail to question it because you're too busy to check, or because the person is an authority, or because it's your boss. If you've avoided the others' sins, you know your own company, you have thought through the assumptions of other players, and you have a circle of people in your organization and elsewhere you can check with.

If you can't question the boss too closely about something that doesn't make sense, ask someone else. If you don't think you have the time to check out things that don't make sense, rest assured that you'll have lots of time soon, when you're reemployed. (By the way, if you see another company in your industry doing something that doesn't make sense, it should put you on high alert for something more significant and unexpected.)

7. Analyzing in a vacuum (the dead lie sins of all).

If you try to do analysis without knowing what decisions your intelligence users are trying to make, you're wasting your valuable time. It's not always easy to get intelligence users to give you a coherent reason for why they want something, but if you don't extract that information from them you won't be able to deliver useful analysis.

If they can't give you a coherent picture of the decisions they face, offer them your own trial balloon. "From what you're asking, it sounds like we're probably trying to decide how to allocate our R&D resources. Is that right? OK, what intelligence would help you do that better?"

If you don't follow this advice, your reports may be intellectually interesting, well-written, fact-filled, grammatically correct and even entertaining, but you will not get a big raise this year, and your position will be eliminated next year. (Hey, that's why we call them Deadly Sins!)

But take the positive point of view. If you turn all seven of these sins on their heads, you have these seven habits of long-lived CI professionals. So validate what you learn, ask for your colleagues' help in your analysis, get to know your own businesses' operations. You'll be in CI heaven before you know it.

Background:

Mike Sandman is senior vice-president of Fuld & Company Inc., a competitive intelligence consulting firm in Cambridge, MA. Prior to joining Fuld, he was an operations manager in the composites industry. Mike has an extensive background in international business. He lives in Brookline, MA, and is co-chair of the town's Transportation Board. Mike often bikes to work through Boston traffic, which he claims is no more foolish than his persistent rooting for the Boston Red Sox.

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Business wargames.

Business wargames.

Mark Chussil, CEO and founder, Advanced Competitive Strategies, Inc. mchussil@competing.com

Summary: Business wargames can help managers put their competitive intelligence (and their personal intelligence) to work, they produce creative solutions (and uncover hidden flaws in conventional thinking), and they lead to consensus and commitment. And yet few managers know how to design or select a business wargame, or how and when a business wargame can add value. Mark Chussil provides an overview of wargames, when they should be run, and how to choose the proper variety.

Theboss spoke first. "Our latest CI says that Frubon is likely to cut their prices 20% next quarter, and Glibb Co is doubling their R&D budget. Meanwhile, it appears MHP Chas started merger talks with CJM. We've got some challenges ahead, folks."

The team looked concerned and thoughtful. Then a thunderbolt hit Chris. "Let's explore our options with a wargame!" Everyone nodded excitedly. The boss smiled. "Great idea! Now what?" The conversation stopped cold. Chrissaid, "Uh... do we look in the yellow pages under 'war' or 'games'?"

Business wargames can be hugely and dramatically effective. They help managers put their competitive intelligence (and their personal intelligence) to work, they produce creative solutions (and uncover hidden flaws in conventional thinking), and they lead to consensus and commitment. And yet few managers know how to design or select a business wargame, or how and when a business wargame can add value.

Awargame is...

Though the military runs many simulations, a wargame is something special and specific: a simulation of combat. Similarly, though businesses may simulate many actions or decisions, a business wargame is something special and specific: a simulation of competition in a marketplace. The keywords in that definition:

- **Simulation.** All wargames, business and otherwise, are simulations. Simulation is what allows participants to test or practice actions in a safe place before they commit real time and money. Simulation requires a model of some kind, even though the model may be hidden (kept in the background) or even invisible (mental models).
- **Competition.** A business wargame that doesn't involve competitors is like an election with only one candidate: it's not likely you'll learn anything. Most models I've seen, even those designed to forecast sales and market share, do not simulate competitive dynamics and therefore are not well suited for business wargames.
- **Marketplace.** Business wargames simulate the arena in which you go up against your competition, namely, the marketplace. Business wargames simulate competitive marketing strategies, and they consider financing, production, cost structures, and supply chains insofar as those areas affect marketing-strategy decisions and bottom-line results.

Business wargames vary greatly along almost every possible dimension. Wargames can:

- Be qualitative, quantitative, or a mix.
- Be generic (for educational purposes) or market-specific (for decision-making).
- Rehearse a single strategy in detail or contrast multiple strategies under multiple scenarios.
- Test specific options or elicit and explore blue-sky alternatives.
- Build on financial models, market models, forecasting models, or mental models.
- Rely on human "umpires" or computer models.
- Focus on making managers smarter, or on making smarter decisions, or both.
- Cost less than \$25,000 or more than \$500,000 to set up, and consume as little as half a day or as much as a week to execute.

Learning from surprises

Why run a business wargame in the first place? The simple answer: surprises. When you get a surprise from a business wargame (or any form of analysis), you have learned something new. That's good news, particularly if you gain that knowledge before your competitors do. That's competitive advantage.

I've seen surprises in virtually every one of the business wargames in which I have participated. For instance:

- A team of regional sales managers discovered that they were making fundamental mistakes about competitors and their own capabilities, despite twenty-plus years' experience in their industry. They changed course to a strategy they considered impossible prior to the wargame. It worked.
- A team charged with revolutionizing their industry came up with a brilliant plan that passed every conventional review. In their wargame they found that if they implemented their plan, they would trigger a devastating price war. They abandoned the strategy.
- A team planned to introduce a new product with a strategy that appeared to be Marketing-101 obvious. Their wargame showed the strategy would likely produce a profit hemorrhage, not a profit gusher. They tested another strategy, liked it, and switched to it.
- A team wanted to know if top management's aggressive sales goal was achievable or a pipedream. In their wargame they found it was the latter... and, when presented with the evidence, top management agreed.

How to choose a wargame

The easy question is whether or not a business war game is right for you. If you are facing a news situation (or want to *create* a news situation), if you are facing a high-stakes decision, if you want creative insight to move you ahead of the competition, if you want to build consensus and commitment among your strategy team, then you should definitely consider a business war game.

The harder question is how should you choose among the many varieties of business war games. I recommend that you begin by thinking about these questions:

- Given the situation faced by your business, what are the benefits of surprise and what are the costs of being surprised?
- Do you want to rehearse one specific strategy or test multiple alternatives?
- Do you want to create a widespread culture of rigorous thinking about strategy or do you want to bring new technology to a small group of strategists?
- Do you want to find the best answer or host a bonding experience?
- Do you face an immediate, do-it-now crisis, or do you want to find a break-out-of-the-box change to long-standing practice?
- Will you run many games or just one?

Business war games offer strategists new ways to think about their businesses, their competitors, and their decisions. Their experiences in simulated markets help them win in real life.

Background:

Mark Chuss is CEO and founder of Advanced Competitive Strategies, Inc, creator of the award-winning Value War® strategy simulator. He and his colleagues at ACS have implemented business war games for dozens of companies, in many industries, around the world. He has spoken at numerous conferences, has published extensively, and has been quoted in Fast Company, The Wall Street Journal, and other publications. Prior to founding ACS, Mark worked at The Strategic Planning Institute (The PIMS Program) and Sequent Computer Systems. He earned his B.A. from Yale and his M.B.A. from Harvard. Mark enjoys cross-country skiing, home theater, and fine red wines. He has jumped off a telephone pole for his own good. He does not intend to sky-dive. Visit www.competing.com to learn more about business war games and strategy simulation.

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SCIP Award nominations due Nov. 22.

The nominations for the SCIP 2003 Catalyst, Fellows, and Meritorious Awards are still open.

- The **Catalyst Award** recognizes individuals who through their volunteer services have made important and valued contributions to SCIP.
- The **Fellows Award** recognizes individuals who have made outstanding contributions to the competitive intelligence profession and SCIP.
- The **Meritorious Award** recognizes a single individual who has made significant and meritorious contributions to the competitive intelligence profession.

The awards will be presented at the SCIP 2003 Annual International Conference and Exhibit in Anaheim, California, USA scheduled for March 12-15, 2003. Please take this opportunity to nominate someone you feel deserves recognition for their contribution to the CI profession and SCIP. [Eligibility requirements and nomination forms](#) for the awards are available at the SCIP website. Completed nomination forms should be sent to the Awards Committee at the SCIP office by Friday, November 22, 2002.

November 08, 2002

Carpe Diem: one expert and why the Greeks liked Ulysses.

On 'experts' and why the Greeks liked Ulysses.

David Carpe, Principal, Clew-Boston, david@clew.us

Summary: The Internet provides an unprecedented opportunity to identify experts in every imaginable area of knowledge. David Carpe provides a brief examination of some of his favorite popular (as well as some lesser known) Internet-based resources for

uncovering expert resources.

General MacArthur once said, “the Greeks liked Ulysses because he had been to the wars and he knew what they were, not because he held a Ph.D. from the Ivy Leagues.” I’m certain that we’d all like to believe that our clients feel the same way, right? Like it or not, today’s Ted-Kennedy-sized market for consulting services is so full of pedigree that any potential client need look no further than their own junk mail to uncover the guru-du-jour.

So what’s a BFA to do when confronted by a bid against, say, a JD/MD/MBA for a health care account? Point to relevant projects? Absolutely. Talk about your own excellent health? Why not! Change your bid? No. Find your own JD/MD/MBA to consult on the project? Yeah, that sounds good...but be sure to get that bio in the proposal before it goes out!

The value of experts

We really need look no further than our own legal system to understand the actionable value of experts (think expert witness). Players from all walks of the service industry regularly confer with such individuals as a way to establish solid footing on a slippery trail lined with jagged service bills. What better way to substantiate your claim that ‘paper is an industry in decline’ than to quote the noted ‘history of pulp and paper’ expert in your presentation?

The Internet provides an unprecedented opportunity to identify experts in every imaginable area of knowledge—from a bacus construction to zoology management. Of course, we’ve all been confronted with that eerie sensation that ‘the expert being consulted’ is probably not an expert at all. Rather than that person is some outspoken author-cum-industry sensation whom might not be worth more than the free bookmark that came along with his last ‘concept’ book. Unfortunately, that’s the risk that we must all assume when managing expert resources.

Beyond the references and the metrics (as in, “Mom! It sold 2 dozen copies!”), there are obvious guidelines that we might follow when assessing experts, such as examining the individual’s track record for ‘prescience’ and similar market savvy. For the purposes of this column, I leave it to you to determine the best route to take, as dictated by your own firm or client requirements. Here is just a brief examination of some popular (as well as some lesser known) Internet based resources for uncovering your expert resource.

This is *not* an examination of all-you-can-eat-‘cause-maybe-I’m-an-expert resources that can be found all over the Internet (e.g. conference speakers from many conference you can think of.com, book author bios via sites like Amazon and BN.com, or worse still, sites like Yahoo! Experts that are populated by just normal brains with lots of free time). Rather, this is once again a summary of a few of my favorite expert repositories.

American Society of Association Executives www.ASAENet.org

Aside from Groucho Marx, everybody loves to be part of a club or an industry association. The ASAE serves to support the thousands of executives who oversee the thousands of associations catering to all pockets of industry. From this one site, you’ll be able to search across roughly 6,500 associations, all with a web presence.

Once you’ve identified the associations supporting your industry or discipline of interest, simply contact members services to submit your request for an expert resource. This resource might be the President, a Board Member, a regular Member or some other party involved with the association, such as a critical vendor (though it is likely that vendors will also act as members).

I mention this resource because I have always found it of value to specifically quote an Association President, not a member, when delivering subjective data that is supported by such a party. Generally speaking, I do not spend a lot of time trolling the ASAE members sites for other directories, just a management/board/leadership overview. Often, the acting President is a credible figure within the community already (e.g. SCIP).

Directory of Investigative Journalists <http://bolles.ire.org/dij/>

Okay, for me this is sort of a two-step approach. Not sure where to go for your expert? Try calling an investigative journalist with already established contacts. It is likely that you will be able to quote a journalist as an expert as well, depending upon the published/reported knowledge of such an individual, coupled with an examination of credibility/reliability. In fact, many clients consider journalists to be subject matter authorities or experts. Personally, I do not. I want to know their sources.

The point of this website is that you can look country by country at journalists affiliated with different private and public organizations (e.g. colleges, newspapers) and seek expert advice within your territory or area of interest. For example, your current domestic insurance expert might not be fluent in regulatory issues in a recently deregulated Indian marketplace.

Please keep in mind that this is a cursory glance at a resource such as this. There are many journalism databases all over the world, just not enough space here to list them all. For example, if you are only focused on UK/Ireland, you might visit www.nuj.org.uk for their listing of island-area journalists.

The Yearbook of Experts website www.ExpertClick.com

This is the website for the 'Yearbook of Experts' publication. You will be able to search for experts by keyword, topic, and geography (or member profile number). This also includes access to journalists (again, considered by many to be valuable resources). They include all sorts of information for each expert, from press releases to audio clips.

There are fees for some areas of usage, and I'm not quite certain that there are any quality control measures set up to evaluate experts, since it appears that anybody can simply pay to join the expert database. You should be careful before you take stock in any of this site's resources (or the others for that matter). It's better than the Yahoo style free-for-all (where anybody with free time can become an expert), but it's not quite what a law firm might turn to for reliability. Also, I noticed that there were no experts in the "Raccoon Problems" category... how come? And why create that category? Just to keep me awake wondering?

Where journalists and sources meet www.ProfNet.com

This is a site run by PR Newswire, and so it is quite well done. The free version allows a visitor to submit a request for expert services to myriad parties, by geography, and with other restrictions. According to the team at ProfNet, "ProfNet is the oldest and most comprehensive of the Internet-based expert-networks available to journalists." They offer three ways to connect with experts and information sources—all at no charge to reporters:

- ProfNet Search, which queries approximately 10 thousand potential sources and 'cloaks' your query so that nobody knows what you're up to.
- ProfNet Database, which allows you to search about 7,500 expert profiles.
- 'Leads and Round-Up' which basically sends out email tip-sheets in a newsletter format, sorted by subject, on a regularly scheduled basis (e.g. Crime on Fridays, Health on Thursdays and so on).

Loosely grouped, all 'sources' supporting these services fall into these resource-based categories:

- Colleges and universities
- Corporations
- Elected officials
- Government agencies
- Hospitals and medical centers
- National labs, think tanks and scientific associations
- Non-profit organizations
- Public relations agencies

If you're willing to spend money, you will be able to access more information, more raw data (PR Newswire core services) and generally go deeper into the site. However, if all you need to do is put out a quick request for an expert resource in some specific category or geography, you'll be able to get it done for free via the ProfNet Search interface (described briefly above).

The largest experts directory www.HGExperts.com

Hieros Gamos (the 'HG') caters to the legal industry, and so this free resource site is fairly well put together and particularly comprehensive. The database has something like 5 thousand experts, with notes, bios, contact information and other related data where available.

This includes access to expert witnesses, medical experts, consultants, mediators, legal personnel and so forth. All in all, it's a nice version of what ProfNet (above) offers via their ProfNet Search product—but it does not require that one be a current journalist to access such profile data.

Also of interest, this site is quite well organized. For example, the insurance category is broken up into specific areas of interest (title insurance, property, recovery, bad faith, etc.). This is very useful when you need to hit that red double bulls-eye and not just land inside the circle.

Well, that wraps up this column. As mentioned in earlier columns, please feel free to send me an email if you have some area of

Background:

David R. Carpe, is principal of Clew in Boston. He received his BFA with a concentration in Stone Sculpture from the George Washington University. Later, David received his MBA with a concentration in Finance and Entrepreneurship from Babson College, where he authored a case on Valuation for the Division Chair. He has worked in research with Fidelity, served as the founder and CEO of a venture backed software company, and most recently has been working with Clew serving some of the world's most formidable organizations. He has also served as a Volunteer Teacher with the National Foundation for Teaching Entrepreneurship. David, his two sons, and their dog reside in Lexington. He is a member of SCIP and IRE along with several other associations and has spent the majority of his career involved, somehow, with research, analysis, consulting and planning. Direct: 781.674.CLEW (2539) www.clew.us

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November 06, 2002

Handling those pesky vendors.

Handling those pesky vendors.

by Chris Buckingham, President, Caesius, chris@caesius.com

Summary: The plethora of products and services addressing the CI space combined with low cost telephone and email sales tactics create a massive number of unsolicited intrusions by vendor sales people. Are vendors pesky and annoying? Most definitely, but they're not going away. Chris Buckingham provides a few tips on how to manage these vendor distractions to the advantage of you and your employer.

For information professionals and analysts, annoying telephone calls are no longer limited to aluminum siding sales people calling during dinner. The plethora of products and services addressing the CI space combined with low cost telephone and email sales tactics create a massive number of unsolicited intrusions by vendor sales people.

Add the vendor "elbow rubbing" that occurs at your local SCIP chapter meeting and the routine follow up calls from the exhibitors visited at the SCIP international conference and before you know it, vendors are eating up an inordinate amount of your time. Below are a few tips on how to manage these vendor distractions to the advantage of you and your employer.

Ignore or exploit?

The knee jerk reaction is to stay on task and ignore the vendors completely, but is this wise? Believe it or not, in spite of their peskiness, vendors just may have products that can make you and your employer more productive. But there are also some less obvious benefits.

Knowledgeable sales people (no oxymoron intended) can be very informative about professional and marketplace issues. Remember, they have a perspective from dealing with many customers on a variety of topics. Also, the good ones stayed educated on your industry as well as theirs. By talking to them, you might get some valuable insights and learn about some new information sources.

Sales people can also be a gold mine of competitive information. They love to build rapport and are anxious to impress you with their conquests, so take advantage of their loose lips. Without too much prodding you can usually find out if your competitors are using their products and why. With some additional coaxing you might learn a whole lot more.

Many vendors offer free seminars and other educational opportunities on industry topics, technology trends, etc. One of my prior employers used to host events like these annually on the French Riviera. Yes, you will have to put up with some vendor hype, usually in the form of a boring 15 minute Powerpoint presentation, but often these seminars can be very educational, particularly if the vendor brings in industry experts as speakers. A short sales pitch is a small price to pay for some continuing education.

Finally, vendors can provide great support for your local SCIP chapters. Rather than complain about vendor participation, figure out creative

waystoprofitfromit.Offeravarietyofmeetingsponsorships,foraprize,ofcourse.Youmightevenconsiderannualvendorsponsorships wheretheyouofferasingagement,signage,spaceataliteraturetable,etc.inexchangeofasizableannualcontribution.Yes,youwill besubjectedtosomeover-promotionbutinreturnyou'llgetsomegoodprogramcontentandraisesubstantialfunds.

Fridayafternoonhonesty

Allunsolicitedvendorcallsareaninterruptionandlikely,anannoyance.Afterall,youweren'tjustsittingaroundwaitingforPaulPolyesterto callandbendyourearaboutthisoverpricedcompetitionkiller.But,asestablishedabove,therearegoodreasonsto“manage”vendors.My favoritetechnique?SetasideacouplehourseveryFridayafternoonjustforvendors.Wheneverasalespersoncallsorrequestsan appointment,suggestFridayat3pmasatimetocallbackorvisit.You'renotlikelytohaveanyinternalmeetingstodealwithandtheonly salespeoplewhowillinterrupttheirhappyhour,golfgame,orlongweekendarethosewhobelievethyhaveagreatfitfortheirproduct.

So,you'veclearedtwohoursonFridayafternoonsforvendors,andthecallsarecomingin.Oneotherpieceofadvice—givethemtheground rulesupfront.Goodsalespeoplewanttoknowthedecisionmakingprocessandthecurrentfiscalsituationasearlyaspossible.Itsavesthem alotoftime.Soletthemknowhowwillbeinvolvedandwherethemoneywillcomefrom.Ifyougivethemthefactsandtheystillwanttotalk thenthe'y'refairgamefor“benignexploitation”.

Empathyandusedcartactics

Acoupleofotherworthwhiletips:

Pleaseremember,yourcompanyhassalespeopletoo,andsomeofthemarebetterthanothers.Chancesare,someoftheannoyingtactics employedbyavendor'ssalespersonareprobablypracticedinyourownbackyard.Bealittleempathetic.Afterall,therearemanygood productsrepresentedbybadsalespeopleandit'sadisserVICetoyouemployertorejectaproductforreasonsotherthanitsmerits.

Finally,alwaysaskforabetterdeal.Oncesalespeoplehaveinvestedthetimeandefforttotakeyouthroughtheirsalescycle,theydon'twant tolosethesale.Intoday'seconomicclimate,vendorsdon'tknowwherethenextdealisgoingtocomefromsotheirsalespeopleare authorizedtowheelanddeal.Forbestresults,makesureyouhaveabasisforaskingandyou'verehearsedyourrequest.Goodsalespeople knowyou'dratherpaylessbutwillneedtohearsomejustificationbeforecavingin.

Arevendorspeskyandannoying?Mostdefinitely,butthey'renotgoingaway.Ratherthanlettingtheirsalespeoplemakeyoucringe,learn howtomanagethemtogetthemostforyou,youremployer,andyourlocalSCIPchapter.

Background

ChristopherJ.BuckinghamispresidentofCaesiusSoftware(www.caesius.com),makersofWebQL,anawardwinningwebharvesting softwareresolution.Hehasover28yearsofexperienceinthecomputerhardwareandsoftwareindustry.

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ThegatheringandinternaldisseminationofCI.

ThegatheringandinternaldisseminationofCI.

JaneMarin,UniversityofStrathclyde,Scotland. jane.marin@zg.tel.hr

Editor'snote: InJulySCIP.onlinereadersrespondedtoasurveyconductedbyaSCIPstudentmember,JaneMarin,insupportofherthesis researchforaMScinInformationandLibraryStudiesfromtheUniversityofStrathclydeinGlasgow,Scotland.Thethesiswasconcernedwith fourkeyquestions:

- Whatiscompetitiveintelligenceandwheredoesitcomefrom?
- WhocollectsCIandhow?
- HowisCIdisseminated?
- WhoaretheusersofCIandhowisthisusageevaluated?

Thereportcomparedanswersstothesequestionsbasedonaliteraturereview,onlinequestionnaire,andfollowupinterviews.Thisarticleisa summaryofherresearchfindings.

What is competitive intelligence and where does it come from?

All but four of the survey participants listed news providers as a source of CI. However, CI literature does not place as much emphasis on news providers as it does on primary information sources, such as employees, senior management, competitors, clients and suppliers, which all featured less prominently in the survey results (see Table 1).

The next top three sources (corporate websites, trade publications and competitors' annual reports), though mentioned in the literature, were not stressed as much as the respondents noted. The follow-up questionnaire, however, asked participants to rank the various sources they had indicated on the original survey form. These results were more consistent with the literature and seem to indicate that the primary sources of CI are more valued although access to them presents more challenges than secondary sources.



Table 1: Who or what are the sources of CI you gather ?

Who collects competitive intelligence and how?

Few survey respondents worked in a CI group that was a distinct entity. The majority of the organizations (59%) located their CI function in the marketing department. The literature, the survey, and follow-up questionnaire results all showed an increasing reliance on the collection of CI secondary source information using technological tools that enable real-time access to fresh data or information sources.

Both the survey and the literature noted the absence or under-representation of librarians in CI work (see Table 2).



Table 2: What position do you hold ?

How is CI disseminated?

Both the literature review and the primary research found that the dissemination of CI is more and more reliant on technology. In the survey, e-mail was the most frequently used vehicle for distributing reports, newsletters, or news items about competitors. Follow-up questionnaire responses also confirmed that e-mail was most useful in time-sensitive cases though not necessarily the "best" vehicle.

The literature suggested that corporate portals might offer organizations a more efficient system for integrating their information and knowledge resources. Companies seem to be more adept at integrating the technological vehicles used in capturing and distributing information, including competitor related forms of it, and customizing delivery or presentation to specific user needs.

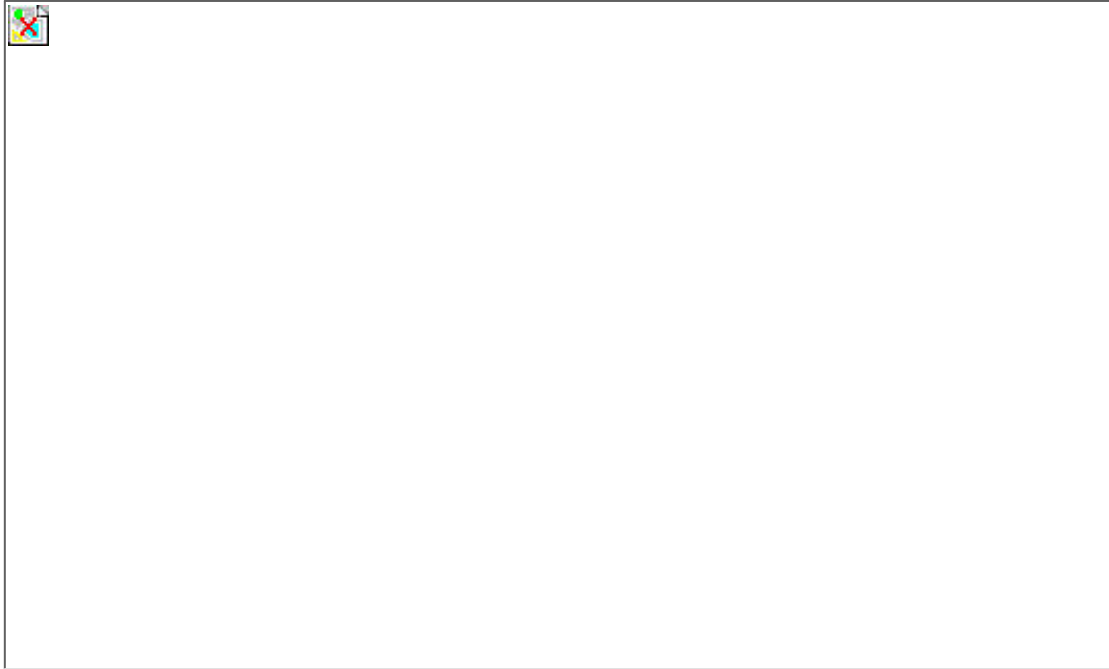


Table 3: What are the vehicles used for distributing CI in your organization ?

The research highlighted some of the limitations of intranet technologies presently in use, especially in terms of content management challenges (e.g. to prevent information overload or distrust by users of stale or outdated information) or access (usually restricted to certain users for security purposes). Some of these limitations may help to explain the less prominent use of intranets for distributing CI (see Table 3).

Some follow-up questionnaire responses indicated that intranets were effective for CI dissemination but could not be relied upon because of infrastructure issues that prevented everyone from having access to the content.

Who are the users of CI and how is this usage evaluated?

Managers, marketing, and sales staff are the main users of CI (see Table 4). Evaluation of CI usage is not a straightforward activity as it is difficult to quantify. A great deal has been written about why corporations should engage in CI activities. These writings emphasize the potential, even necessary, benefits this would have on their standing in their respective industry or sector.

However, there is not much scientific evaluation of these assertions. The survey and follow-up interviews both confirmed that few organizations have any mechanisms in place to measure the value of CI. Some have undertaken activities toward evaluating usage of the CI they gathered and distributed.



Table 4: which employees have access to or remain users of CI?

Recommended areas for further investigation

It is difficult to put an easily quantified value on information (CI included), or on its effectiveness or benefit. More detailed analysis is needed to compare corporate portals with other IT alternatives from a cost-benefit perspective before the theoretical and intuitive benefits of portals can be proven.

This dissertation research was based on the assumption that CI falls under the information science field. Instead, it was uncovered through the research process that CI activity is moving toward the broader academic 'umbrella' of knowledge management.

The reason for the lack of visible involvement of librarians in CI work became clearer during the research process. Though well skilled in information retrieval methods, analysis of the data and information retrieved is not an inherent specialty of librarians who are, stereotypically, perhaps not as adept at networking and people contact as their colleagues in the marketing and sales departments. Several follow-up survey participants indicated desire for increased involvement of librarians in the collection of secondary CI resources.

Background:

Jane Marin was awarded her MSc in Information and Library Studies, with Distinction, from the University of Strathclyde in October. She is working with the International Federation of the Red Cross in Geneva through December, conducting a user needs analysis and preparation of a proposal to update the organization's intranet and make it available as an extranet to 80 field offices and 178 member Red Cross or Red Crescent Societies. In her free time, Jane is editing her thesis for publishing and actively seeking new opportunities to put into practice recently honed information retrieval and research skills. For more detailed information, contact the author.

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Finding the needle in a stack of needles: five finds from Dialog.

Finding the needle in a stack of needles: five finds from Dialog.

Bob Stewart, manager of strategic intelligence, Dialog, bob.stewart@dialog.com

In today's business world where information—and deadlines—move at electronic speeds, two problems exist in our search for fast, accurate information: information overload and information overlook. We have access to more information now than ever before, but it is too much to manage? For buried deep within that mountain of information could be the unexpected gem that truly makes a difference. The aim of this column is to cast light on a few of those competitive intelligence gems, and suggest one possible gateway for finding more.



[Editor's note: This column was developed to provide SCIP members notice of new articles on Competitive Intelligence which appear in published journals. It will be a regular feature in SCIP, online. Each entry includes a reference to the original article's source, and a link to the online full text document on the Dialog service. Dialog account owners can click directly on this link to view the full article.]

Pharmaceutical industry

'Toward competitive intelligence.' Breitstein, Joanna
Pharmaceutical Executive, v22n9, Page: 110, Sep 2002

In an article from the September 2002 issue of *Pharmaceutical Executive*, Joanna Breitstein interviews a 23-year pharmaceutical industry executive who conducted a study of competitive intelligence in 15 pharmaceutical firms. Article available at (Dialog account required): ABI/INFORM® (File 15), Accession Number 2425016, or click [here](#).

Personal care industry

'Competitive intelligence returns: it's plain to see from the response received after the debut of this column that marketers in the personal care field do indeed know that marketing matters.' Barson, Donna C.
Global Cosmetic Industry, Volume: 170, Number: 9, Page: 68(2), Sept 2002

Over the past few years, the personal care industry has become more complex and highly competitive. Donna C. Barson, of Barson Marketing Inc., discusses how CI can help overcome the coming challenges and help marketing professionals take advantage of new opportunities. Article available at (Dialog account required): Gale Group PROMT® (File 16), Accession Number 10122731, or click [here](#).

Mergers and acquisitions

'Picking the competition's brains for deal insight.' Austin, Thomas E
Mergers & Acquisitions, v37n9, Page: 30-32, Sep 2002

If you're involved in a merger or acquisition, you might think about going to your competitor to get necessary market-based due diligence information. Sound improbable? An article in *Mergers & Acquisitions Journal* suggests it may be time to re-think how your market due diligence is conducted. Article available at (Dialog account required): Gale Group Trade & Industry Database™ (File 148), Accession Number 15018298, or click [here](#).

Private sector intelligence

'Risky business.' Hulnick, Arthur S
Harvard International Review, v24n3, Page: 68-72, Fall 2002

What are the differences between private and governmental intelligence? What position do governments around the world take on government-sponsored industrial espionage? A recent article explores these topics and more: Article available at (Dialog account required): ABI/INFORM® (File 15), Accession Number 2420069, or click [here](#).

Competitive intelligence in the Federal market

'Competitive intelligence in the federal market: want to devise effective marketing strategies or attack the competition's strongholds? Take advantage of the intelligence available through the Freedom of Information Act.' Grimm, Robert D.
Contract Management, n10, p24(4), Tuesday, October 1, 2002

Very few firms know with any degree of accuracy what their market share is in the U.S. federal government. Find out how to use the U.S. Freedom of Information Act (FOIA) to help find the answer. Article available at (Dialog account required): DIALOG News Room (File 990), Accession Number 520554142 or click [here](#).

Background

Bob Stewart is manager of strategic intelligence at Dialog and 12-year veteran of the online information industry. Dialog, a pioneer in developing the technology behind electronic information retrieval, is the world leader in providing online-based information services to organizations seeking competitive advantages in such fields as business, science, engineering, finance and law. In 2002, Dialog celebrated 30 years of excellence in the online information industry. www.dialog.com.

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November 05, 2002

FYI: new and notable.

- [New focus on CI drums up big business for SCIP speaker.](#)
- [Protecting the profits: the key role of industrial security.](#)
- [Using the invisible web for CI: free online seminar November 26.](#)
- [Research project on the strategic management practices of corporations.](#)
- [Reuters accused in website earnings report privacy case.](#)
- [FDI now includes transcripts of companies from two major European indices.](#)
- [Special issue on knowledge management: the Emperor's new clothes.](#)
- [Wanted: CAO - Chief Acronym Officer.](#)

New focus on CI drums up big business for SCIP speaker.

Anne Barron of ABComm, a specialized exhibit management consultancy, is one of five finalists for a Business Achievement Award given by the Greater Ottawa Chamber of Commerce. ABComm coaches organizations on how to maximize their presence and CI collection at special events and trade shows. Anne is a featured speaker at the SCIP annual conference.

"Competitive intelligence provides trade show exhibitors with invaluable insight to their market, the industry, how they stack up against competitors, and specifically what they need to do to be more effective on the exhibit floor itself. The service provides an impartial assessment of the strengths and weaknesses of a firm relative to key competitors. It also equips an organization with the tools and templates to gather and analyze information on their own in the future." Press Release, November 6, 2002. www.AB-Comm.com

Protecting the profits: the key role of industrial security.

In the wake of the Enron and Tyco scandals, it seems clear that fraud and other kinds of white collar crime require careful scrutiny, along with protection against industrial espionage. While the government is trying to protect everyone against every threat, private security has to be more focused and industry-specific because of costs and limited resources. Determining which threats to defend against requires the kind of analysis for which intelligence professionals are well prepared. It may be the right time for SCIP members to take up the challenge of threat analysis, a role they have not played very often in the past.

Join speaker Arthur Hulnick and other SCIP members at the [Boston Chapter's](#) November 21st meeting. Arthur is an associate professor of international relations at Boston University, and is a veteran of 35 years of government intelligence work. He is also a member of the American Society for Industrial Security.

Using the invisible web for CI: free online seminar November 26.

Led by Chris Sherman, co-author of *The Invisible Web*, this seminar sponsored by Inmagic will show you how to gain access to business information that is not normally available through search engines spiders. Topics to be covered include:

- How search engines and spiders work.
- What is the Invisible Web?
- Why the Invisible Web should be an integral part of your CI function.
- Strategy for using the Invisible Web.
- Tactics for searching.
- Key sites and sources.

Information and registration is at Inmagic.

Research project on the strategic management practices of corporations.

The Systems Research Center of Boston University project, in collaboration with International Data Corporation (IDC), is focused on understanding how companies can create and support dynamic strategic management capability. Their goals are to uncover an ERP-like approach using technology to support strategic decision making, and develop business and technology frameworks that will make the model work. Understanding how it can be better incorporated into this model is a primary focus. Contact [Dawne Shand](#) for additional information.

Reuters accused in website earnings report privacy case.

A small Swedish information technology company filed criminal charges against news service Reuters PLC for obtaining an earnings report from a webpage it considered private. Reuters published Intertec's third quarter report from a webpage before the company released it publicly, but after it became available through their website. The report was available to anyone who typed the correct web address, but not available through normal channels on the site. If authorities deem that Reuters retrieved the information from a public part of the website, it could make anything on a company's web server public information. [Washington Post](#) October 28, 2002.

FDfn now includes transcripts of companies from two major European indices.

Fair Disclosure Financial Network has expanded its collection of interactive transcripts of material disclosure events to cover companies in two major European indices, the FTSE 100 and Eurotop 100. FDfn is the world's largest transcriber, webcaster, and distributor of corporate earnings conference calls. Its network of partners include Thomson Financial, Shareholder.com, Multex, Investext and WILink. www.fdfn.com

Special issue on knowledge management: the Emperor's new clothes.

Information Research's [first quarter issue](#) is focused on articles evaluating the knowledge management trend. Article titles include:

- I=O (information has no intrinsic meaning).
- Understanding knowledge management and information management.
- The duality of knowledge.
- Knowledge management: re-thinking information management and facing the challenge of managing tacit knowledge.
- The nonsense of knowledge management.
- Knowledge management: another management fad?

Wanted: CAO—Chief Acronym Officer.

"I'm guilty of doing it—frankly we're all guilty. We operate in some type of secret society during the day. We are acronym addicts. I am reminded of my participation when my friends stare at me with blank faces when I talk about work. I recognize that blank stare—it's the one I wore in the first few weeks of my job. Sometimes I still find myself distracted when talking to colleagues; I wonder if I should have known what ETO means. I quickly scan my notes—hmm, not there, so I add it to my growing acronym list." From Editor's column, [Supplier Intelligence Authority](#) October 18, 2002.

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