



The Human Side of Competitive Intelligence

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In a high tech world, we are sometimes tempted to quantify, define and plan with a hopeful certainty about the outcomes. It is common for leaders and teams to specify a view of the future or of the market and create surefire (they hope) means to be successful. It is also common for people to assume that all within an organization are disposed to work together enthusiastically and seamlessly.

"Plan A will lead to 30% sales growth this year!"

"Our new product will blunt Competitor X's market share and result in 10% incremental profit."

"All we have to do is get everyone on board with the new strategy, shift the execution focus and convince the potential customers and we will win!!!"

We do similar things in competitive intelligence. We start with a noble goal of understanding what every significant competitor is trying to do. Add to that knowledge of the market forces at play. Then, almost magically, we hope, the organization will snap to attention to devise

the tactics needed to overcome the competitive gaps (leading to the 30% sales growth, of course). More than that, we will be universally welcomed for our valuable contribution to the organization. Let the praise rain down on our heads.

The only problem is that things are not that simple. Much as turning an ocean liner is a slow process that cannot be abbreviated, establishing an effective competitive intelligence system to deliver significant results is not a fast process. Aside from the knowledge and techniques that are required, many human elements affect progress.

Would it be surprising to you, for example, that many of your assumed allies and supporters are not rooting for your success? Other "people" complications await you.

Competitive intelligence needs the sponsorship of a senior leader in the organization. That leader may or may not recognize such a need. Indeed, perhaps they think it is a sign of weakness to ask for help. Why don't they already know what their competitors are doing? Is the

identification of a competitive gap an indictment of their strategy?

Sometimes the ownership (and presentation) of competitive information is embodied in a person or organization already. If that is true, then it threatening when someone else furnishes competitive intelligence information. Preserving their job easily can take precedence over supporting the new competitive intelligence person or function.

Maybe someone previously tried competitive intelligence and the results were not helpful. (It is worth noting that almost any overhead function is subject to such criticisms.) Organizations experts can

use their memory to slow or block most any new move.

Moreover, the list can go on. People and their responses to change are probably the largest determinant for the success of a new competitive intelligence program. The people within the organization are more important than the tools, computer systems, training, presentation techniques, insightful interviewing and any other element of the competitive intelligence system.

Therefore, considering all of these people issues and the other important details, here are fifteen steps (starting from scratch) to build an effective, recognized competitive intelligence function in your business.



Figure 1: Steps for Creating CI Function

Step 1: Find The Pain

These days, when the economic conditions are so difficult, may seem like the wrong time to some to get started. The other view (and one that I agree with) is that competitive intelligence is more important in hard times though the methods employed may be different. So, what is the absolute first step that is critical for the eventual success of a CI program?

Simply put, the first step is to “find the pain.”

By pain, I mean the obvious, significant and personalized need for competitive intelligence felt by someone that is in a senior position in the company.

Many things can cause their pain. Here are some common examples.

- A manager asks them to present an overview of the competitive environment and realize that they only have the barest understanding summarized.
- A competitor's move blindsided the organization and is causing significant “pain.”
- Multiple competitors are repeatedly introducing better products and

services and the manager does not know how they can do it.

- A key customer is contemplating a switch to a rival and tells them that their offerings (which they assumed were the best) are not competitive.
- The manager's goal to increase sales and profits has stalled and no one can explain why this is true.

Whenever something like one of the examples occurs, a manager feels responsible.

Alternatively, if you rather, they are held accountable. They will literally pay for useful, credible and timely information that helps them. This is the prime moment for a competitive intelligence activity and a magic time to get started. If you attempt to get started without identifying a senior manager sponsor, you will risk engaging in an academic exercise that is unlikely to have an impact no matter how insightful your analyses prove to be.

This is a high-risk time for competitive intelligence.

If you offer to help with the manager's pain and yet cause more pain, your CI career will be short. Nevertheless, without the pain, few

managers seem willing to sponsor competitive intelligence activities and fewer still support them over time.

Fortunately, (from a getting started on CI perspective) there is abundant pain evident today.

Competitive pressures caused by the macroeconomic environment relentlessly buffet companies. The need is great to operate efficiently, retain customers and survive until more general prosperity returns. People that can help their organization's leaders navigate through the times will be highly valued for their contribution. Business leaders are looking for people to help ease their pain. If you are one of those people and can provide "pain relief" through effective competitive intelligence, then you may just be successful in starting a long lasting service.

First, you have to get the job.

Step 2: Get The Job

Do you believe that the best jobs are the ones created for you? That is, because of your interests, skills and initiatives, you convince someone to assign to you what you wanted all along.

Competitive intelligence positions are often like that. It starts with recognizing that something is missing in the organization and seeing that the missing element is causing real pain to someone in leadership. Though his or her response to the pain may not be the immediate formation of a competitive intelligence function, there is an opportunity for someone with insight to gain such a role.

What does it take to get the job? There are two important points to remember.

First, ask for the job by name.

That means that using "competitive", "competitor" or "intelligence" in your discussions is important. At this stage, it only signals the domain of your effort. It does not mean that the leader has to authorize a budget, commit significant personal time or invest their prestige in the effort. It does alert those that are observant that you might be about a larger, more valuable task.

Here is what you might say to your leader to get their support to move to the next stage.

Their manager asks for an overview of the competitive environment but they realize that they only have the barest understanding summarized.

"I'd like to pull together a summary of competitive information for you. I could post a presentation for your review shortly about our top three competitors. Would that be interesting to you?"

A competitor's move blindsides the organization.

"I am researching how competitor X goes to market without us knowing something about their intentions. As I uncover intelligence about what they did, would you like to see the highlights?"

Multiple competitors are repeatedly introducing better products and services and the manager does not know how they can do it.

"I have some speculation about how our competitors are operating that allows them to beat us to market. I think that some competitive intelligence might be useful to plan our countermoves. Would you like to see the conclusions from this study?"

A key customer is contemplating a switch to a rival and tells them that their offerings (which they assumed were the best) are not competitive.

"I plan to speak with our sales team to get to the bottom of what our customers are

telling us. I think that I can succinctly summarize the key differences between their products and ours. Maybe using this intelligence we focus of what improvements matter most."

The manager's goal to increase sales and profits has stalled and no one can explain why this is true.

"There seem to changes happening in the competitive environment affecting our performance. Perhaps studying the market forces and presenting them to you would help us refine our strategies. Is this interesting?"

In every case, we are asking for a competitive intelligence role but in a way that is easy for a senior leader to accept. It is also fair to note that we need to be concerned about others in the organization. However, if you are just starting and are modest about your ambitions, they are more likely to be cooperative than obstructive.

Implicit in asking for the job is setting expectations about the expected benefit.

Therefore, the second major point is to promise improvement, not miracles.

It is unlikely that you will create or uncover something that will fully and immediately address whatever competitive gaps exist. If you did have that valuable knowledge, it is quite likely that you are not well prepared to market to senior leaders. Starting a new competitive intelligence program requires you to think through how people accept new information that may contradict their established views, how to collect information from many information silos and owners that exist in the organization and how to present conclusions when you might not yet have the personal credibility with the thought leaders.

You have to move slowly and methodically to become credible, to gain allies and to build relationships.

There is an axiom that consultants are advised to follow. The axiom says to never promise to solve a client's problem. Instead, promise to improve things by 10%. Not only is this reasonable in many organizations that view change (and consultants) skeptically, it makes the change process more tenable for the people that are affected and required to support the change.

Make no mistake about it. If you hope to introduce effective competitive intelligence into an organization where it has not

previously existed, you are going to affect how business conduct, strategy evaluation and how people view the future. This is overwhelming for most to comprehend. Move fast and you will guarantee the quick and cheered demise of your fledgling effort. Move with wisdom and you can create something durable and incredibly valuable to your leader and organization.

Circling back to asking for the job, note how you are simply asking for a task assignment rather than a full time job. Once you have the initial task assignment with the right expectations, it is time to give your leader a taste of what is to come.

Step 3: Tease The Vision

If you have gotten this far then you already spotted an important need, identified a senior leader that cares about it and managed to get the assignment to address the need. Even better than that, you worked into the discussion the topic "competitive intelligence." Whether it really registered with your leader is unclear. They may have simply been glad to offload a difficult subject to a willing soul. Their expectations are low (and you should have tried to set them that way).

More importantly, you have begun to set a people oriented tempo to your work.

You are recognizing (or at least hoping) that competitive intelligence will touch important areas for leaders in the company. CI analyses will show how well competitors are doing and sometimes how poorly your company is performing.

Meanwhile, leaders and peers determine how things are going. They set in place strategies that they think will be effective. Your work will eventually help them be more successful. However, that time is in the future. Between now and then is a minefield of egos, insecurities, turf wars, differing philosophies and more. Do not worry too much. You can get through it. I will help you.

What is next in our slow march to introduce a successful competitive intelligence program into the organization?

You tease them.

There is more than one meaning for "tease." Sometimes I tease my children in a humorous way. I am trying to be funny and share a laugh with them. This is not what I would do in the office. Rather, a "tease" there is more like a small bite of an appetizer that is fine when tasted but provokes an

even stronger desire for what might be coming. The small bite makes you lust for a full meal.

Why tease the leader in your response? There are two reasons.

You are not ready to serve them a "full meal" of competitive intelligence. The full meal definition will become more apparent as we continue our discussion. Suffice to say that when you only have an appetizer, then you feature the appetizer. Remember that your leader does not expect much so one especially good serving of anything will probably delight them. Do not overpromise.

Even if you have everything ready (e.g., comprehensive information, immaculate presentation, credible strategic recommendations, solid quantitative and qualitative backup, etc.), it will not be accepted by an unsuspecting leader. They simply are not likely to be ready and you will actually damage your credibility if you attempt to "force feed" them. Do not over deliver.

Your goal is to begin establishing a pattern that will characterize all of the competitive intelligence things that are to come. The pattern will eventually lay the foundation for your personal competitive intelligence

brand. (There are more things in the foundation but some are very important to start early.)

Here are three things to tease your leader

1. You will state the problem using their language and their measurements of success.

Why? Because you want to be known as someone that attempts to understand the larger problem from the leader's perspective. It is possible that you will not get this exactly right the first time. However, your standing will increase when others noticed what you are doing.

Assuming that you are presenting information in a slide format, a practical way to do this is make the first slide a summary of the key question and the success metric for the business.

2. You will demonstrate superior collaborative skills.

How? You will do this by showing that you talked to other key people about the topic. Sounds simple and some people assume that this goes on all the time. The all too common problem is that it does not. You will be different. You will canvas people on all sides of the topic, inside and outside the

company. Their feedback (even their dissent) will be included and credited in your presentation. You will be the honest broker of information.

A simple approach is to include a list of contributors on the title slide. In addition, at key points in your presentation, you can point out who provided key inputs. Aside from showing how you collaborate, you want to stroke those that helped. You will need them later.

3. You will show evidence of interpretation.

Many people will focus on the "what" question. That is, what is happening? They present answers as an exhaustive set of facts. That good as far as it goes. However, a senior leader has much too much "what" information and precious little "so what" interpretations. Again, you will be different. You will try to give the meaning to the information that you have uncovered.

Expect that there will be discussions and disagreements with your meanings (this is actually a very successful outcome). Your bona fides are not established. Nonetheless, simply trying makes you stand out.

There is so much more to do. That is why the three steps that I have outlined are only a tease.

You might decide on three different steps for your tease. Whatever you decide, the important concept is to preview what is to come, to introduce new things in ways that are easily accepted and engage your leader in such a way that they will ask for more.

It is worthwhile to sketch all of the other things that will guide you over the next few months. That is a more complete foundation than the simple tease.

Step 4: Frame the Foundation

Where I live, it is common to have slab foundations for homes. Slab foundations are solid blocks of poured concrete. The structure is built on top of the slab. A slab foundation must have several characteristics in order to support the house.

It must be shaped correctly for the house. It is costly and difficult to alter the basic shape after it hardens.

Although it looks like a solid mass of concrete, it actually conceals a great deal of infrastructure including electrical

conduits, plumbing and cables (which provide strength).

Everything attached to or embedded in the foundation must be in the right place (again, it is hard to change things fixed in concrete). For example, the plumbing for sewage should emerge where the bathrooms are planned to be.

Finally, after doing all of the necessary things, it is important to preserve your flexibility for all of the remaining elements of the home. For instance, the placement of the second story wall for the guest bedroom is not to be tied to something in the design of the foundation.

The foundation serves its purpose though it is not a visible feature of the home. The structure obscures what is beneath it and many people give little thought to what they do not see. However, you absolutely must pay attention. In addition, the quiet time after your first management presentation is a good time to establish what will support all that you do later.

Skip the foundational work, however, and the compliments will quickly be replaced with sympathies for the expensive rework that is required. After the sympathy, you will start to hear the whispered questions about

how could someone forget the foundation?! This can cause damage to your prestige and credibility. It is embarrassing, expensive and (this is the good news) avoidable.

The next step is to frame the CI foundation for all that is to come. Your foundation's long-term success requires three things.

1. Create the Blueprint

This is where you begin to imagine what the full vision for the CI function will be. Expect to customize it to your environment. That is, construct it to meet the needs of the people of the organization. As an architect does before designing a home, you will begin asking people about what their hopes are for competitive intelligence. How do they like to get information? What are the critical times for receiving intelligence? What do they already have or know? When and why have they been disappointed in the past? All of the answers help you to identify how to construct the program. They will suggest the mechanisms for delivering information, the schedules that make the most sense, the sensitivities to avoid and the dreams that the leaders have for their success.

Do not make this too hard. Simply talk to people and record their responses. List the concrete responses to what they have told

you. In most organizations, common culture and experiences will help you because the responses will cluster so that you can focus on a smaller number of items. Note that you are not implementing all of this now. You are making near term plans that still allow for later flexibility.

2. Establish Your Principles

Make sure that you know what is important. These are your principles that are relevant throughout the lifetime of a CI function. Among the many reasons that principles are important is the simple fact of pressure. You will feel pressure as you become known for your CI contributions. There is pressure to produce valuable interpretations, of course. You will also confront other pressures such as ethical issues (*"can we use this information that I got from a former employee?"*), shortcuts (*"we don't have time to double check our sources"*) and misuse (*"it just needs to look pretty; I don't care what it says"*). Here are some principle statements to consider.

- ***"I will always focus on value to senior leaders and the business strategies."***

This does not mean that others will not benefit but it does establish priorities.

- **“I will conduct myself according to a code of ethics (see the SCIP code of ethics).”** Now is a good time to identify who can give you legal support as issues arise.
- **“I will properly and consistently characterize (e.g., assumptions, facts, guesses, estimates, speculation, recommendations) the content that I provide.”** This establishes and maintains your credibility.
- **“I will orient all I do toward helping effect positive change.”** A CI function implicitly challenges what is happening inside your company as you analyze the competitive environment.
- **“I will always remember that people (i.e., leaders, colleagues, others) matter most.”** People are the source of the best information, they are required to support and accept competitive intelligence and all change comes through the efforts of people.

3. Make Broad, Fruitful Relationships Possible

This may seem redundant. And, it is.

Personal relationships determine your success or failure. This may seem counterintuitive in the age of complex information systems, databases, web searches, analytical tools and academic research. All of these things have a place but in absence or a robust foundation of relationships, your failure is more likely than not. Here is a partial list of relationships that will be critical. You need to begin now thinking about how to nurture each set of people.

Sponsoring management/leaders – do you understand their needs?

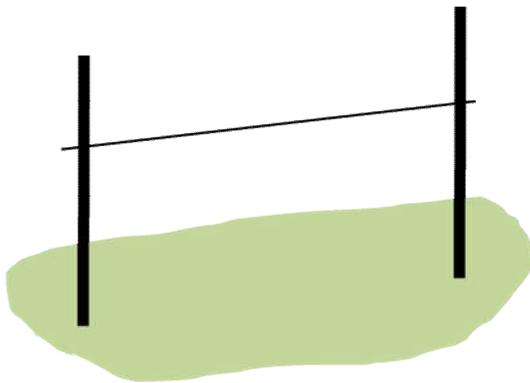
- **Other managers** – Who owns what strategies and, hence, might be overly sensitive to what you are doing?
- **Peers** – How can you provide value to them so that they willingly contribute information and reflection?
- **Sources** – How can trust and reciprocal value be established?
- **Support** – How can you get their help to build the information infrastructure

and provide other (e.g., legal) services?

Step 5: Setting Some Standards

There are two types of people in this world. (Do you love it when someone reduces all of the complexities of life to simple categories?) Yet, clearly, some things fundamentally divide people into camps.

Standards, or more precisely stated, the expectations that we have for ourselves, is one of these dividing lines. Here is the illustration that I like to use. What do you see below?



There is a bar suspended between two posts. Now, if I told you that you had to move between the two posts but not disturb the horizontal bar, you have two choices. You can go under it or you can go over it. Choosing not only where the bar is set but also how you pass through the vertical bars

says something about you. That is what separates all of us into one of two camps.

First, the bar is the set of expectations that we have for our work and ourselves. Everyone has expectations that soon become evident to those that we spend time with regularly. The expectations (and our ability to deliver on them) largely defines our personal and professional brand. Where you set the bar for competitive intelligence is exceedingly important. Why? Because you will find that you are touching on important subjects involving important people that might drive important changes in the organization. By definition, this requires high expectations of you.

Set high expectations in three areas.

1. Integrity

Decide right away that you will have the highest integrity in all of your dealings. It is easy to say that this is your goal. Nevertheless, you should know to expect challenges to your integrity. Directly and indirectly, there are tests for fairness, honesty, trustworthiness and more. Fail one of these tests because you are not prepared and there will be little forgiveness.

2. Value

Some people love to do analysis. They are enamored with the techniques, tools and the intellectual stimulus of grinding through data. Others love the presentation of information. Nothing pleases them more than assembling 50 beautiful slides full of animations and transitions. Talking to people and exchanging views is another seductive activity that some CI practitioners enjoy. While all of these things are worthwhile and important, they are all not meaningful when they do not deliver value.

My definition of "value" for competitive intelligence is credible answers to important questions that when answered well may lead to changes in business strategy.

To create an enduring competitive intelligence function, you must deliver value. Being satisfied with anything less means that you will be looking for another job soon.

3. **Work Quality**

No one (that I know) sets out to do poor work. Nevertheless, poor or mediocre work is common throughout the corporate world. A lack of review of the work or by skillful self-insulation of the effects of the work enables poor performance. The evidence of poor work for a CI person may be in shoddy

research, haphazard analysis, ineffective presentations or neglected personal relationships. You do not have the option of performing poorly and it is best to understand that from the beginning. The quality of all that you do must be top-notch. Strategy leaders expect such quality because they are accountable to stockholders, senior management and employees.

Setting the bar is step one. Step two is deciding whether you go over it (meet or exceed expectations) or whether you go under (do the least possible to get by). This is the difference between the high jump and the limbo.

You must sign up to set the bar high and then choose to go over it. This is the only standard that will work over time. It is the only way to influence meaningful change in the business strategy of your company. (Save the limbo for the pool party to celebrate your success.)

"Setting the standard" is about you and your aspirations as you develop the competitive intelligence function. Afterwards, you are ready to introduce both things to the rest of the organization. This will be your competitive intelligence brand.

Step 6: Introduce the Brand

I have traveled around the world for business and pleasure. From the Old City in Jerusalem to the rural villages of Kenya or the crowded streets of Bangalore, I can always find certain things that mean just about the same thing that they mean in Texas. For instance, no matter where I have traveled, I can always get a Coca-Cola. The markings, bottle shape and product are essentially the same everywhere. You and I can rely on those facts that make it comfortable for us to choose Coke (or maybe you are a Pepsi person?).

Coke is a valuable brand. It got that way because many years ago there was a vision for the product, an explicit way to market the vision and scrupulous enforcement of the brand that emerged. Brands are powerful shorthand ways that we assign value to or judge the worth of something. They help us cut through the noisy clutter of life to make simpler decisions. If we are associated with a “good” brand, then we find our pathways smooth and clear. Conversely, few things are harder to overcome than a “bad” brand (if someone tried to sell you a Yugo, would you buy it?).

Of course, each of us establishes a personal brand. Personal branding is a bit of a rage in

corporate life today. Establishing a brand, the thinking goes, ensures that your unique value is recognized. (Translation: you get to keep your job.)

It is also important when starting a new Competitive Intelligence program. The CI brand that you develop will empower you to accomplish great things. In previous entries in this series, we have already talked about Setting Some Standards and hinted at branding elements at the Tease The Vision step. Now it is time to make the critical branding elements explicit. Here are three critical branding elements for your Competitive Intelligence program.

1. A logo.

Yes, a logo. This may seem trivial to you but it is important. At first, it will not matter



that you have a logo. However, over time this will become the mark that says, ***“I reviewed this material, I stand behind the data and I stand up for the interpretations that are included.”*** You will use this logo on email, presentations, white papers and newsletters that you produce. In the meantime, many other people will present competitive information but none (except you) will have the “seal of approval.” It is

incumbent on you to produce work that is worthy of the seal.

2. A target.

It is possible to define your target market broadly (e.g., “everyone in the company”). If you do so, then your marketing campaign will reflect that audience. However, we have already covered in Find The Pain that your primary audience should be senior strategy leaders. This is a small group that shares certain characteristics (e.g., busy, value oriented, longer-term thinkers, pressured, smart, skeptical, etc.). Focus your marketing efforts on them and what they care about most. The challenge is to identify how they prefer to communicate, how they arrive at decisions and key things that drive the timing of their decisions. Understand that and you have your “target.” Now aim your arrows accordingly.

3. A method.

Although much of what I am conveying is to the CI person (or group), the plain fact is that the success of the CI effort depends on relationships outside of the CI team. Thus, the method of working with others successfully is paramount. The challenging aspect of this method is that you will find yourself involved with a wide range of

experts and personalities. Giving value to get value, crediting others lavishly, orchestrating stimulating discussions to clarify meanings, having quiet conversations in safe settings and so on will distinguish you beyond measure. Your method is your intense “people orientation.”

Okay, introducing the brand means that you are just starting. You will not be perfect and not all of the pieces will be in place immediately. Nevertheless, over time and with constant attention, the competitive intelligence brand that you are introducing will become recognized and valued throughout your organization.

How do you accomplish the tasks that are ahead? Get the right tools.

Step 7: Accumulate The Tools

A friend of mine called to borrow a specific tool. He was going to start a repair to his riding lawnmower and needed a torque wrench. He has a large number of tools already – screwdrivers, saws, sockets, pliers, drills, etc. – that he has previously used to make or repair things around his house. However, on this day and for this lawnmower repair project, he needed something that he did not already have. So what did he do? Well, he started with the

first and most powerful tool that he had to find the tool that he was missing. He called someone that he knew. Now it turns out that I was no help that day since I did not have a torque wrench. However, I could have easily connected my friend with someone else that had a torque wrench to lend.

There are three significant lessons.

1. It is possible to anticipate the need for certain tools.

When that is the case, it is best to get them as soon as possible. For example, every homeowner (or mechanic) needs a hammer. Everyone needs an assortment of screwdrivers. Everyone needs a saw of some sort. A person should master these common tools because they are useful in solving many problems.

In competitive intelligence, identify and acquire the common tools early. Although you do not have to have all of these tools on day, it is useful to know that you will need them. Here is a partial list by category of some tools that you will likely need.

- Presentation Preparation (e.g., PowerPoint, [Impress](#))
- Basic Analytics (e.g., Excel, [Bissantz SparkLines](#),

- Financials Comparisons (e.g. [Yahoo Finance](#))
- Earnings Calls Summaries (e.g. Thompson, [SeekingAlpha](#))
- Basic Meeting/Facilitation (e.g., whiteboards, poster charts, easels, markers, laser pointer)
- Collaboration (e.g. website, SharePoint, [Groove](#))
- Database (e.g., Access, [MySQL](#))
- News Collection (e.g. RSS clients – [Snarfer](#))
- Organization Charting (e.g., [OrgChart Plus](#))
- Newsletter Creation (e.g., Microsoft Word, Publisher)
- Website Creation/Editing (e.g., Dreamweaver, Microsoft Expression)

Notice that I did not include a complete all-in-one tools suite from a competitive intelligence software vendor. There may come a day when you need exactly that type of product but it is not this day when you just assembling your competitive intelligence effort. In my opinion, you are far better served starting (mostly) with tools that

you already have and trying to accomplish the tasks manually. This way you learn firsthand about what is important to you and your customers before attempting to justify, acquire and deploy a major system.

2. Think of key people as “tools.”

They are tools in the sense that they help you accomplish your competitive intelligence tasks. Indeed, [The Human Side of Competitive Intelligence](#) series is all about how people affect and enable competitive intelligence. Sometimes they will help you with the specific problem. Other times they will provide supplemental information. Perhaps they will direct you to others when they cannot help you themselves. Finally, it is a truth that often they will have specific expertise or organizational credibility that you lack. Thus, it is a great advantage to identify these key people (at least by function) quickly so that you can begin establishing quid pro quo relationships. After all, they will want something from you (and, when you do CI well, you will have something of great value for them) too. Here are the functional categories where you need to know someone.

- Legal (to provide review and guidance on sensitive issues)
- Ethics (sometimes provided by Legal people, to provide and explain standards for conduct)
- Financial (to perform detailed analyses and interpretations, also to make comparisons with internal financial results)
- Marketing Communication (to observe and track competitor's external communication and messaging)
- Senior Management Mentor (to give you perspective on how senior management thinks and what they value)
- Internal Analysts (to answer questions and provide interpretations of information)
- External Analysts (to exchange understandings and studies for the industry and specific competitors)
- IT Support (to assist in implementing systems that can be widely used in the organization)
- External Process Networks (to help understand new methods and tools for competitive intelligence)

3. You will not always have what you need.

Do not panic because someone probably has the tool (or knows the person) that you need. The most useful attitude that I have found is to assume that the solution can be found and then to orient my search accordingly. That is, I expect to find just the right tool for my problem. When I do, I promptly add it to my tool bag for future use. Even better, the confidence that I gain by mastering the use of a new tool to solve a difficult problem make my value greater as a competitive intelligence professional. Remember when we introduced the brand for this new CI function? Becoming known as a proficient problem solver is part of the personal branding.

My friend completed repairing his riding lawnmower for 20% of the cost that he would have paid to someone else to do the work. He acquired and used a new tool. He added it to his toolbox for future projects. His confidence about solving mechanical problems has grown. Altogether, this was a successful project for him.

In a similar manner, it is time for you to begin the same process as you begin executing competitive intelligence functions regularly. Accumulating the tools, mastering their use

and solving problems will become your mantra.

Step 8: Back to the Vision

I do not know anyone that starts out his or her life with this vision.

“My plans are to be mediocre in all that I do. Perhaps my performance in my family, at school or at work will be good. No matter what, it is okay if one day someone notices and remembers me.”

If we heard someone say such things, we would feel pity for the limited hope that they feel and the small impacts that they aspire to make on those around them. We might suggest that if they started with something different, their life might result in far more significance. They might be inspired to achieve or be more than they are today. For is not our future often affected by what we hope to accomplish.

Well, the importance of a vision for a person is also true for competitive intelligence.

Similarly to a personal vision statement, the vision statement for the competitive intelligence function will describe both what we intend to be and what we hope to accomplish for the organization. The “being” part talks about the function and its

role. The “accomplishment” part talks about the impact on the business.

The reason that we have waited until now to broach the subject of formalizing the vision statement is that doing so prematurely will result in an empty or ignored statement. If you have followed something like the steps that I have outlined, you have enough information about how to do the work, personal awareness of your work values (i.e., brand) and at least a little demonstration of your organizational value that helped a senior manager. Now you can begin to work out a future vision for the CI function.

What does a vision statement look like?

My preference is to have a succinct statement. Here are some examples.

Our company will have a best-in-class Competitive Intelligence system that makes a direct, positive, timely and measureable difference in our business and product strategies.

Our company will have a Competitive Intelligence system that is widely recognized as proving tangible, high value and well understood insights to those defining and implementing important business or product strategies.

The Competitive Intelligence function for our business enables significant strategic advantages on an ongoing basis in support our business goals

There are three important things to remember when formulating the vision.

1. Do this with a senior manager sponsor.

It is fine to draft a statement for their consideration, just be sure that they own the output. It is far better to have their ownership attached than for you to have the perfect wording. In fact, be sure that your drafts are not too polished. If appropriate, use the draft as the basis to interview the manager. Using the terminology and points made by the sponsor, and then revise the draft so that they can “sign” to signify their ownership.

2. Be ready to explain the implications of the vision.

Any manager worth his or her salt will immediately want to know the cost and benefits of such a vision. The truth is that they are more likely to want to know the costs at this stage. (Doubts may linger about consistently delivering the value.) Since the next step in [The Human Side of Competitive Intelligence](#) series deals with budget, I will

defer the details to that section. Just assure them that the costs will not exceed the value over time and that you want the ROI for the CI effort to be the measure of your success.

3. Accept that creating a vision statement may seem a little academic.

Your organization may embrace such statements as necessary and important. My experience suggests that more organizations will not value vision statements so highly. Ask to be humored. Explain that the vision is part of your long-term plan to deliver high value. Say that you are planning a systematic approach that you will shortly have ready that will be consistent with the vision.

Although the vision can be very powerful for your organization, it will be most powerful for you. It is a way to keep in front of you the “dream” and “standard” that you have for the CI effort. Leaving out the dream and standard means that you will be more likely to lose focus and this will lessen your chances for success. Now you need resources to implement the vision.

Step 9: Secure the Budget

You are really rolling now. The organization is likely beginning to notice your efforts to start competitive intelligence. They are beginning to discern the shape and quality of what you are doing. Enough people are likely to be intrigued but some skepticism remains. Meanwhile, at least one senior strategy manager is familiar and supportive of your work. Great job!

Now it is time to ask for money.

It is a truism that business measures value with money. Budgets are allocated for important Investments. Potential returns are “dollarized.” Revenue is used to evaluate products. Headcount is translated to loaded costs. Everything comes back to the money that is spent or the money that is earned for the business.

The competitive intelligence function cannot (and should not) avoid being involved in these discussions since they characterize so much about what the organization values. Similarly, the use of money (“follow the money”) is a great way to understand another company's priorities and strategies. Leonard Fuld says that the cardinal intelligence rule is “where money is exchanged, so is information.” Money often

is a proxy for what is important internally and externally.

It should be no surprise that the CI function needs money (investments).

The CI investment is required to acquire tools, to implement infrastructure and to get information on an ongoing basis. It is also necessary for one more important thing. That thing is "respect." Sometimes there may be a misguided notion in the organization that the benefits from competitive intelligence are free or that the investments should be minimized. Neither of these sentiments is correct. CI is not free because there are expenses and people's time involved. Moreover, minimization of investment as a goal is only supportable when CI is treated without regard to the value it delivers.

CI investments should be justified based on the value produced compared to the resources invested.

This is a financial calculation but it determines the level of respect that the function (and its advocates) will receive. Management values what they count and they count nothing as precisely as they count money.

There are three things to do at this stage.

1. Ask for a budget.

This is very, very important because it shows that you respect what you have started and expect others to do so as well. Confidently asking for a budget signals that you believe that you can provide significant value. You will approach the senior management sponsor with your request and you will be specific about the reason for the request.

2. Limit what you ask for.

It might be tempting to request a large budget that is far beyond whatever has been spent to date. This is a mistake and may prematurely end your CI program or damage your relationship with your senior manager sponsor. Ask for something that is incremental. This helps your manager justify the expenditure and, perhaps, allows them to approve it without others being involved.

3. Use the money on infrastructure.

There are many possible uses for the money. You might be tempted to acquire analyst reports or attend events that can be quite costly. Resist this. Instead, ask for money and support to develop infrastructure elements of the emerging CI program. This will prepare you nicely for subsequent steps

when the CI efforts are well known in the organization (and the customers and contributors increase). For example, use the money to create a website, database or portal that provides a framework for sharing information.

Later budgets will be easier than the first one especially when the value becomes more apparent. Explicitly accept the principle in action that money should be allocated for valuable activities, prove that the CI function provides good ROI and demonstrate that stepwise expansion of the function is prudent (and acceptable). Your senior management sponsor will appreciate your awareness of their mindset (spend wisely). Even more, their ownership interest in the success of competitive intelligence (and you) will grow as their financial commitments are rewarded by your performance.

Step 10: Build The Presence

Some people just have “It.” Others noticed them even when there is a crowd. People want to hear what they have to say and their opinions seem to matter more. From the outside, it is not always clear just what they have done to earn such esteem. After all, much of what they are saying is no different from what others have said, done

or thought months again. Nevertheless, their presence alone tangibly affects others.

Organizations can be the same way within a business. Often the outgoing, extraverted functions (think Sales) dominate the culture. Other times, it is the engineering group and their collective innovation that everyone notices. Maybe an iconic leader is dominating due to their vision or leadership. Distinctive presence matters because it helps establish and reinforce the importance or contributions of the group. People attribute value because of the presence projected by a person or group.

The competitive intelligence function must have a “presence” to be successful.

I suppose one could argue that everyone already has a presence of sorts. Yes, that is true. Nevertheless, few have the kind of presence that reflects distinct, unique value that compels instant respect from others.

Now it is time to project your presence more broadly.

This can take many forms but all will have the following attributes in common. Remember these 4P's of presence for competitive intelligence.

Persistence

The presence you project will consistently demonstrate and reinforce your brand (i.e., the prime directive being “value delivered to strategy leaders to improve performance”). This means that you will always be identifying with the larger issues facing the organization and helping those that are making strategy decisions. Proactively, you will track and interpret the competitive environment to provide insight. Assume that senior management wants this.

Personal

It is possible for there to be a CI group but that does not obscure the fact that people trust people. As we have stated many times, CI effectiveness is largely a function of relationship effectiveness. This means that while you will employ analytical techniques, modeling and advanced information searches, you will never lose sight of what makes change possible and palatable to the organization. That is, embrace success measures tied to strategy changes owned and implemented by other people.

Perspective

Most people work with their head down (focused on a tactical assignment). Meanwhile, an effective CI person will usually work with their head up (interpreting

the strategic significance of the environment). This will make you especially attractive to strategy leaders since this is their perspective as well. Hence, when changes occur (and they regularly do), you are the person that can help reorient the company and its strategies.

Public

Remember at the beginning of this series. My advice was to “fly under the radar” (i.e., tease the vision) for a while. The idea was to get the CI basics established. Now is the time to be public. You are ready to announce to the organization that you are actively coordinating and executing the competitive intelligence function. There are several important ways to do this.

Here are some practical steps to consider when announcing your presence to the organization.

You will need to have a website within the company.

If you have secured the budget, then work with your IT department (or do it yourself). The key attributes for the website are that it is widely accessible throughout the organization, it supports the collection and searching of information, it can host multiple

analysis tools and that it projects an image consistent with your branding.

Just like an external business that attempts to drive traffic to their business website, you will implement things that drive traffic to your CI website.

Two excellent tools are types of periodic communications.

One is a competitive news summary that will contain your interpretations for each news item. A second is a periodic newsletter that will focus more on analysis and trends. Both of these tools should always point back to content on the website.

Another very useful tool is a presentation that you can give to various functional groups about competitive intelligence.

For instance, it will quickly get the attention of your marketing team if you have valuable information about the strategies of competitors. They will be both a source and a consumer of competitive intelligence. Likewise, the Legal team will want to understand how you are conducting CI. The Sales team will want to know how competitors are doing at specific customers. In each case, you will have at least one opportunity to show to each group the

scope of CI, their roles and the website that you have created. Be ready to project the values and standards that you have established.

You may not become a rock star because of competitive intelligence. However, over time, people will acknowledge and value your presence because of who you are and what you provide. You are on your way!

Step 11: Expand The Brand

It is breakout time. It is time to go public with all of the competitive intelligence work that you have done.

There are at least five important things to do at this stage. Before listing them, let us review everything in the important prior steps.

You spotted a competitive intelligence problem of interest to a senior manager and you delivered a useful answer.

Even though you started small, you intentionally began to show the outlines of a compelling vision for competitive intelligence.

You established a foundation for the effort and made the first introduction (in a limited

way) of your CI brand. A few people began to notice what you were doing.

With confidence, you approached your senior manager sponsor with a larger vision for competitive intelligence. Behind the scenes, you established some standards to guide you and began acquiring the basic tools. As part of this, you also identified the critical people and groups to help you.

All of the prior steps made it possible for you to request a budget, albeit a small one, to begin establishing an infrastructure. With the infrastructure slowly coming online, you began the more overt announcements of what you were doing and how it was important to the organization.

Here we go with five ways to expand the awareness and scope of your competitive intelligence brand.

Increase the depth and breadth of information of competitive intelligence information.

The key here will be working with functional organizations that have their information silos. Interfacing to their systems will be crucial and you will want to minimize their pain. The alliances with IT will facilitate the interfaces and the sponsorship of senior

management will encourage cooperation. Even so, your goal is to elicit cooperation by delivering value back to the same organizations,

Publish in other forms within the company.

For large organizations, it is common for many groups to publish information. Marketing, communications, sales, business development and other groups seek to inform their people about relevant market news. Though each group has its own interests, beating competitors unites them all. You can become very prominent (and appreciated) by volunteering content. Do it. And remember to include your visible branding elements with each article.

Formalize your relationships with external analysts.

If your company already subscribes to a set of particular services, call the analysts and introduce yourself. They will be quite interested in knowing you since you will be their customer and, perhaps, you will provide useful information to them over time. From an internal viewpoint, external analysts will be one good primary source for information and perspectives. Good industry contacts are valuable to your reputation.

Define and deliver custom information for functional groups.

For example, by now the financial team knows what you are about and you should have a similar understanding of their activities. They miss many useful things because they focus so much on numbers. Build them a tool or report. You can do the same thing for business development, sales, marketing and legal teams. In fact, if you are intentional about it, you can begin to be the honest broker of all kinds of information within the company.

Create alliances with other business divisions.

This recommendation holds for large companies that have many businesses. You will likely find that the competitive intelligence efforts in other divisions are not as advanced as what you have put in place. If that is so, good! That will give you an opportunity to make your sponsor look especially smart as you share with the other division what you have learned and implemented. Of course, you will carefully and rightly acknowledge the important role of the sponsor.

Undoubtedly, there are other things that you might do to expand your brand. The key is

that the time for cautious modesty is passing and the time for overt promotion has arrived. Without apology and with great confidence you can declare that a professional, impactful competitive intelligence function is in place and operating. Congratulations.

Step 12: Go For The Value

If you managed things right, people all over the company are beginning to notice the competitive intelligence work that you are doing. Your name is known. Probably they have heard about your website and seen at least one of the analyses that you completed. Things are really bubbling and other senior managers are taking notice. Your initial senior manager sponsor is happy with what you have done and just a little proud of your work and their role in getting it started. Now you will expand your effort to go for the value (to the larger organization).

The next step is very important and sensitive.

Simply put, you have to move beyond your initial sponsor to deliver value to other senior managers. Why? It is because effective competitive intelligence (CI) generally moves “up and over” in an organization (rather than remaining isolated in one group). This reflects the truth that multiple

senior strategy managers need long term CI value. Significantly, most do not receive information that is researched, interpreted and delivered as needed.

Your goal is to get your initial sponsor's help to facilitate a competitive intelligence discussion among their peers.

If you have not lived with senior managers up to now, it is time for you to move into their neighborhood. Without a promotion, the most likely way to accomplish this is to be invited. The best person to issue the invitation is the manager that you have already helped prosper. Once you are invited, the goal is to establish relationships that can endure. In other words, you want a recurring invitation that goes beyond formal meetings (and that is issued by more than one senior manager). Ideally, you will nurture relationships that result in unguarded discussions over time. It is through the informal discussions that you will discover the true pain points (or opportunities, if you wish) that present openings for CI to make a strategic impact.

Here are some useful initial steps.

- Create and present a short summary of the newly developed CI function.

- Give an overview of the CI processes and techniques that are new to the company.
- Present summaries of key competitors and their strategies.
- Your challenge is to create a public backlog of CI projects.

Here is how you do it in five steps.

1. Develop a template for key intelligence topics.

There is much information about this on the [web](#). If you prefer, call it a one-page statement of work (SOW). Use the SOW with senior managers to define a competitive intelligence project. Work with your initial sponsor to define the format that works best in your organization among senior managers.

2. Still working with your initial sponsor, brainstorm a list of potential projects.

This has the advantage of ensuring that the initial sponsor's projects are included and that the positioning and phrasing is correct for the audience. This list will be a starting point for the next step.

3. Meet individually with each senior manager.

Respond to any general questions that they have about your work to date. Explain how their organization has been or could be involved with competitive intelligence. Show them the list that you started with your initial senior management sponsor and ask if there are important projects that they would like to add.

4. Assuming that other managers add projects, request a follow up meeting to go over the SOW for the projects that they added.

Importantly, get a deadline for each project. That is, have each senior manager tell you when the answer is needed.

5. Finally, pull the complete list together and request a meeting of all contributors to review the priorities for the projects.

Now you really need your senior manager sponsor because they will help you manage this discussion. It is likely that there will be differences of opinion about the most critical projects. The goal is to finish with a list of 3-5 projects for the next six months.

Actively publicize the value that you are working toward delivering.

Notice the contrast to the initial low-key project. This time, less cautiousness is appropriate. Accept that you are responsible for serious answers to important questions posed by multiple senior managers. Accordingly, you will want to get help from the organization to get these answers and there is no productive way to do this without proclaiming your intentions.

The publicity should include a web page for each project on your CI website, explicit descriptions of status and plans for each project and repeated presentations to interested groups about the project goals. Assuredly, there are more possibilities that may be appropriate for your organization.

How do you get help to complete these projects? You have to recruit a staff.

Step 13: Recruit a Staff

One of my favorite assignments has been to visit my alma mater and recruit graduating students. It has been fun to sit across from them as they start their careers and give them a sense of what is possible in the corporate world. They are eager, bright and full of potential. Who knows what they will accomplish as they follow their passions and develop their skills?

I fondly remember my own college interviews. My interests came down to two very good choices of solid companies. Both did the kind of work that interested me. Both were in good geographic locations. Either might have worked out well. I chose the Texas company and never looked back. All these years later, I can state my career there was rewarding. I learned, contributed and gave back to the company many things.

The inducement to work for one company or another comes down to the factors that are important to you. As I mentioned, I cared about the focus of the company, my specific assignment, where I would live and, of course, the pay. More or less standard concerns, I would guess. I recruited others for corporate life in a similar way.

What about recruiting for the competitive intelligence function that you are building?

In the formation process of the competitive intelligence function, it will be essential to recruit help from within the company.

Here are three reasons.

1. **There is too much to do for one person.**

A prior step of [The Human Side of Competitive Intelligence](#) series dealt with expanding the scope. If that step was successful, you are now into areas beyond what you started doing. Engaging with other senior managers (besides your sponsor) will introduce a wide range of topics. Your choice will either be to accept the new assignment (which means that you will need more resources) or reject it because you lack the necessary resources. I suggest that you accept and put a staffing plan together. Find more information about this later in this article.

2. **The needed knowledge (e.g., financial, marketing, technology, business development) is unlikely to reside in one person's head.**

The exciting challenge of competitive intelligence is the diversity of subjects involved. The valuable competitive intelligence work comes from people that can integrate the disparate information into patterns and stories. Given a choice, this is where you want to focus. The implication is that you will work with a range of experts that have narrower focus than yours. Your task is to identify and begin nurturing these contributors. Make it easy and rewarding for them to supply you with information.

2. **Less intuitively, it is important to cede ownership of some of the work to cement the support for competitive intelligence.**

Even if you could do everything, you would not want to do so. The reason is that you are after meaningful change in the organization's strategies to make the business more successful. Most businesses involve many people that must understand and support change. Moreover, there are not people more interested in these topics than the people that feel ownership. Your job, after recruiting for scale and specialties, is to recruit owners. One way you do this is to give them some say in the direction of the analysis and the interpretation of the results.

How do you recruit someone to help with competitive intelligence?

Here are some hints that have worked for me.

- **Know whom you want to help.** Make a list early with the names and functions of the people that are critical to your success. This is part of assembling your toolset.

- **Give before you get.** That is, by being proactive and intentional, provide value to the people that you want to help before you ask for their help. There are many ways to do this through providing information, tailored analysis and targeted news.
- **Respect their role.** This is a key issue since effective competitive intelligence can often be threatening to strategy decision makers. As we have previously discussed, CI can call into question previous decisions and current directions. Therefore, be gentle and cautious with the people that might need to change.
- **Credit their contributions.** Few things motivate people more than looking good in front of management. If you can make this happen for people, they will be far more willing to help you. On the other hand, slight someone and you can almost guarantee that they will not be helpful.
- **Limit their work.** While some people will be inclined to help you, they probably cannot do so when it takes too much away from their other

assignments. Hence, when you have something for them to do, carefully define your request and make it as small as possible. The principle is to give credit liberally but make assignments conservatively.

- **Transition ownership.** Over time, some parts of the competitive intelligence function will begin to run smoothly. Look for people to assume ownership responsibilities for these parts. These people will “announce” themselves to you by their regular interest in CI. Alternatively, management may redefine their job to include the CI tasks that you have developed. Either way, involve and guide them.
- **Identify and enable champions.** Once you have been successful a time or two presenting to senior management, others in the organization will want to do the same. Let them. The only things to “control” are the standards that you have established. Within those boundaries, let those with the energy and ability to provide excellent analysis establish their own identity.

If you apply these hints, it is not hard to find people to help you. Perhaps a few will do CI fulltime. Even if that is true, you will need still more people that are not working fulltime to help. Thus, you need to be an excellent recruiter. Luckily, you can be.

What is next? Simple. No more will you simply do passive analysis. No more will you wait for others to set an agenda. It is time to use Competitive Intelligence as an offensive weapon.

Step 14: Go On The Offense

By its nature as a service, Competitive Intelligence is a requested activity. That is, a senior management sponsor asks a question about the competitive environment and the CI professional responds. Many experienced people will tell you to stick closely to your senior management sponsor. And that would be right. Nevertheless, there will come a time when you (as the CI professional) will have the professional confidence and organizational credibility to lead.

This is the time to go on the offense with competitive intelligence.

“Going on the offense” simply means that to formulate proactively activities, plans and recommendations that are congruent with

everything that you have already done. Assuming that you have laid the foundation properly, you should have a sense of the opportunities and boundaries within the organization. More than that, you have established relationships that allow you to speculate about the effectiveness of company strategy. Multiple leaders will have noticed your contributions and it will not surprise them that you can do more.

There are three important ways to proceed.

Enlarge your mindset.

This means that you should take ownership of the complete set of strategies of the company. Possibly this statement alarms you. It does not mean that you are replacing the existing management team or subverting their authority. Rather it means that you will begin to look at the whole of what the company is trying to accomplish. Therefore, when you see unaligned things or you notice missing responses to the competitive environment, assume that there is an action for the competitive intelligence function. Importantly, you will also have the opportunity and ability to deliver this type of message to multiple senior managers.

Expand your defense.

Maybe this is counterintuitive. However, most managers think first of what they can learn about other companies or products. Next, they are concerned about generic competitive environmental issues. What they often miss is how competitors learn about their own company. Indeed, it is this awareness that can lead to much more careful policies and procedures, which appropriately limit and then monitor what is exposed. Further, for a sophisticated company, there might be clever ways to obfuscate information collected by competitors. In my experience, this type of discussion does not work well until your credibility and relationships are established.

Characterize your competition.

This is a meta level of competitor analysis because you will be looking at and trying to understand the organizations that are watching your company. For example, which competitors maintain competitive intelligence functions that target your company? How effective are they? What are their weaknesses? These are critical questions to prepare your leaders for their public functions (e.g., speeches, press releases). Few organizations start their CI activities with this task because it requires training and some subtlety to be effective.

Industry relationships will be critical to do this characterization well.

You may think of other things to do to provide increased value to your company. Whatever you come up with, “go for the value” to cement your significance and contributions.

There is one more thing to do. That is to help others understand and apply competitive intelligence better.

Step 15: Evangelize the Mission

The goal of this series has been to describe how to develop and deploy a new competitive intelligence function for your company. The early articles tiptoed around the issues and people sensitivities to the new function. Later, there were more specifics about tasks such as budgets, branding and assertively expanding the function. Boldness became the order of the day.

We talked about how many people will not understand what you are trying to accomplish. Some that do understand what you are attempting will be nervous and suspicious about your aims. Are you trying to supplant their role? Is your goal to criticize implicitly their performance? Why should they help you with their special knowledge?

And, what is it about competitive intelligence that will help them?

All along the way, we have discussed practical tips for the development and deployment. More than that, I have tried to illuminate people issues that are important with the thesis that these issues are the most intractable if not dealt with properly. All of the other issues of analysis techniques, infrastructure design, acquisition of tools and budget are simpler (though not trivial) issues with well-aligned people.

Now we come to the final step.

The final step is to spread the word about competitive intelligence.

Some communities call this “evangelizing.” In Christian circles this means telling others the good news about Jesus Christ. In business venues, it means extolling the virtues and power of a concept, technology or product. The general goals are similar. That is, we are after conversions that represent a change in mindset and priorities.

There are some specific goals.

Solidify the role and reputation of your existing function. Becoming better known will help you protect your budgets and priorities.

Increase your credibility within the company. Similar to the first point except that it has more to do with you as a person.

Explain competitive intelligence to larger audiences. This will help you gain future helpers as more people see CI as important and accepted within the company.

Help the company succeed. All along, we have had the simply stated reasoning that effective competitive intelligence is vital for strategic success.

Prepare your successors. Few people last a long time in competitive intelligence for various reasons. Perpetuating the function requires thoughtful preparation of others.

Improve the execution of the competitive intelligence function. More people will want to help over time and it is incumbent on you to equip them correctly to be effective.

Learn to improve yourself. Speaking publically and broadly about CI will expose both your knowledge and ignorance. Humbly accepting learning will directly lead to substantial improvement.

So, how do we evangelize about competitive intelligence?

Here are three concrete steps that you may consider.

1. Write about it.

The purpose of writing is to reach broader audiences than we can touch by person-to-person contact. In the writings, we can carefully describe our experiences and highlight lessons that we have learned. There are many formats. We have already talked about internal publications such as newsletters. Broader external publications are also available including blogs and magazines. Aside from conveying information, the external writings will also increase your internal credibility. Of course, you must be careful to protect proprietary information and confidences. Most importantly, you must be particularly careful about the identities of the people in any story that you publish.

2. Speak about it.

Many people are auditory learners. They learn best by hearing someone speak about a subject. Others need someone to embody a concept before they trust the communication. On the top of those excellent reasons, there is the fact that speaking can increase your confidence about what you are doing. You will

encounter others that have done far less than you have and this will paint a satisfying picture of relative accomplishment. You will also meet people that can help introduce you to things that you do not know. Finally, you will improve your skills of explaining competitive intelligence. This will always be a vital skill as you continue your CI responsibilities.

3. Teach about it.

If you have followed the preceding 14 steps, you have already been teaching others in your company about competitive intelligence. Now it is time to formalize these lessons. If you are part of a larger company then a good target is another business division. It is likely that the managers of that division will be aware of your efforts already and more likely to support training. A second fruitful training approach is to offer customized training for senior executives. You can equip them with tools, training and process in a one-on-one setting. If this is possible, be sure to be prepared to explain each point crisply. You also need to be prepared to listen. Remember that we have stressed being a trustworthy partner to senior management and this is one way to prove that you are just that.

At the end of the day, competitive intelligence is one of many vital functions in a healthy company.

Is it more important than quality? Or business development? Or sales? Maybe not. However, the problem is not that it is relatively more or less important than the other vital functions. Rather, recognized and successful competitive intelligence is rare within most companies.

Hence, we need success stories and people to tell them. **You can be this person.**



For more information on business strategy and competitive intelligence, visit my website at www.jthawes.com or my Strategically Thinking Blog at <http://blog.jthawes.com>.

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