

BEWARE, NOT ALL INTELLIGENCE IS CREATED EQUAL

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Different types of intelligence require different delivery mechanisms

I have been involved with the implementation of many information delivery systems. Along the way, I have found that the type of intelligence delivered by CI professionals falls into three distinct categories:

- recurrent reports such as CI newsletters or market alert reports
- reference intelligence such as company profiles, benchmarking data, regulatory information
- strategic and tactical intelligence reports such as market assessment, SWOT analysis, benchmarking analysis, M&A due diligence

One of the challenges in delivering effective and timely intelligence is implementing a delivery mechanism adapted to each intelligence category.

DELIVERING "RECURRENT" INTELLIGENCE

Recurrent intelligence allows decision-makers to keep a pulse on their respective markets, key competitors, and technologies to avoid any surprises in a specific industry sector. The majority of recurrent intelligence reports are not directly linked to a specific strategic or tactical decision. They should therefore NOT be the focus of experienced CI professionals whose time is better spent on delivering value-added analysis related to decision support intelligence.

The two key challenges associated with producing and delivering recurrent intelligence include:

Limited time and resources:

Delivering recurrent intelligence is a

time and labor-intensive process usually involving extracted information from sources such as the web, subscription databases, and trade publications.

Broad customer requirements:

Recurrent intelligence is usually delivered to a wide audience across the organization who has different interests and focus areas.

Data processing technology can help implement effective recurrent intelligence delivery systems for their respective organizations. The good news is that the technology components needed to create an effective recurrent intelligence delivery system are already available in the marketplace.

The key is to integrate the right technology components in the proper sequence to produce quality results. For instance, relational indexing and searching, integrated with auto-summarizing and publishing, then coupled with messaging can provide the foundation.

Here is a quick snapshot on the meaning and value of each of these components:

Indexing:

A relational database structure based on MS SQL or an Oracle platform, coupled with basic VB programming, allows users to automatically capture, index, and auto-categorize news and industry information in a keyword searchable database.

Searching:

Copernic, DtSearch, or AnswerChase are examples of the dozens of search engines and text indexes available on the market today. Search technology allows users to manually retrieve information and to receive

recurrent information updates on an automatic basis.

Summarizing:

Here again, there are dozens of text summarizers available on the market today, including Microsoft's text summarizer available in the professional version of MS Word 2002 (to access this feature, go to Tools and select "Auto-summarize"). A text summarizer can be integrated into your relational database structure, and automatically produce abstracted versions of recurrent intelligence articles and documents.

Auto-publishing:

Whether one likes it or not, MS Office (MS Word, PowerPoint and/or Excel) is the most common production platform in use today for the creation of pre-formatted CI newsletters or market alert reports. The key here is to allow users to quickly and easily publish their recurrent CI search results in an easy-to-read, professional format.

Messaging:

In the end, any recurrent intelligence production system needs to be integrated with the messaging platform of your organization (most likely MS Outlook/Exchange or Lotus Notes). An effective delivery system should allow users to create and edit distribution lists in the same environment in which they are searching and producing their recurrent CI reports.

DELIVERING AND UPDATING REFERENCE INTELLIGENCE

Today, basic HTML technology can produce web-based matrices to deliver frequently requested intelligence such as company profiles,

KNOWLEDGE PORTAL MATRIX								
COMPETITOR MATRIX								
	BAN	JDE	MAP	ORA	PPS	QAD	RCS	SAP
COMPANY PARTNER	+							+
INTERNET INVOLVEMENT								
DEVELOPMENT TOOLS			+				+	
IMPLEMENTATION TOOLS			+					
MULTISITE, CURRENCY, LANGUAGE								
PRODUCT FINANCES								+
PRODUCT LOGISTICS MANUFACTURING								
PRODUCT LOGISTICS SALES AND DISTRIBUTION								
PRODUCT PACKAGES								
SERVICE AND SUPPORT			+					
STRATEGY - ENTERPRISE STRATEGY								
STRATEGY - SALES								
SUPPLY CHAIN MANAGEMENT							+	
TCO								

Figure 1: Knowledge Portal Competitor Matrix

benchmarking data, or regulatory information. The creation of a self-service library can save you time while increasing the effectiveness of your intelligence delivery process.

For instance, HTML matrices can be used to display competitive profile information in a very targeted and user-friendly format. (See Figure 1.) Users access specific profile information by clicking on the appropriate cell. Each cell is hyperlinked to a document (PDF, MS Word, Excel or PowerPoint) that contains the desired information. This technology can also be used as the base for *dynamic profiling* by integrating each cell of the matrix with selected sources.

DELIVERING STRATEGIC INTELLIGENCE

Strategic intelligence reports can include a wide variety of topics ranging from acquisition due diligence to market opportunity assessment. Successful delivery of strategic intelligence is contingent upon the following three factors:

Understand the reporting requirements of your decision-makers.

Is the user of your information detail oriented or does he prefer to see

the big picture in two or three slides? Does he prefer getting this information via email or a live presentation?

Establish a clear workflow to document your analysis.

Implement a process to allow CI specialists in your organization to define, prioritize, and document your collection and analysis process.

Present a clear and concise summary of the key facts.

You don't have to be a trained desktop publisher or graphic designer to deliver clear, concise PowerPoint presentations that engage your audience and effectively communicate your message. You only need to remember a few simple rules.

- Use a template. Create and use a template specific to your CI group that includes your logo or brand name and contact information. This standardizes formatting and increases visibility for your group, and ensures consistency throughout your presentation. If you're not savvy in designing your own templates, see if your firm offers a standard template that you can modify or use one provided with PowerPoint.

- Mind the 7 x 7 rule. Keep all your PowerPoint slides to no more than seven lines of body text (that's lines, not bullets), and seven words across the longest line. Write in short keyword phrases, not complete sentences, and don't punctuate the end of each bullet.
- Know how many slides to use. The rule of thumb is one slide per minute of scheduled presentation time. If you include slide builds or animations, you may need more.
- Use background colors for your environment. If you are presenting in a well-lit room, use a clear or light-colored background with darker text and foreground graphics. If you can control and dim the lights, use a darker background with lighter text.
- Keep it legible. Use a typeface that is easy to read, such as a sans serif typeface like Arial for titles, and a serif typeface like Times Roman for the body text or bullets. Make sure your titles are at least 28 point and body text at least 24 point. Avoid two-line titles. Remember, slides are supposed to summarize. Use your handouts to give the audience more detailed information.

If you would like to learn more about designing for presentations, there are many sources of information available. Try www.presentations.com or www.presentationpro.com or www.graphicinfodesign/links for starters.

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