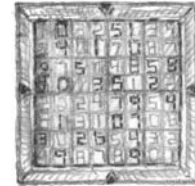


LEVERAGING ADVANCES IN TECHNOLOGY TO MEET CI CONFERENCE CHALLENGES

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If you've ever been responsible for coordinating the collection of competitive intelligence during conferences and trade shows, you know how overwhelming an experience it can be. Information overload is common, but usually that's not even the worst part—trying to coordinate the collection efforts of all attendees can also be difficult and extremely time-consuming.

Over the years, Cipher has been asked to help clients manage these challenges by developing customized competitive intelligence conference management solutions. In this column, I'll share some of the common issues others have faced, let you in on some of the key lessons learned, and make some recommendations to make your own process easier and less stressful.

KEY CHALLENGES OF CONFERENCE COLLECTION

Some of the key competitive intelligence collection challenges faced by CI practitioners during a conference are directly tied with the following contributor behaviors:

- The average business professional perceives a conference collection assignment as a chore before and during the conference.
- Information providers will not contribute information if it requires

more than three clicks to do it.

- Most conference participants take the time to check their e-mail but would not access a Web-based system requiring login to contribute information during the conference.

These common contributor traits are linked with the following competitive intelligence collection coordination challenges.

Proactively identify, define, and store the key characteristics associated with upcoming conferences or trade shows. Maintaining a clear competitive intelligence conference calendar not only allows you to stay ahead of the

logistics associated with each event but also to give sufficient notice to each attendee, thereby improving your chances of participation among key attendees.

Effectively delegate collection assignments to internal and external attendees before and during a conference. You will have to work around the time constraints of contributors who are often too busy (or not inclined) to take the time to login into a database or to attend daily meetings to discuss competitive intelligence before or during a conference.

Set up a quick and easy contribution screening process to filter

The screenshot shows a web browser window displaying the CIPHER application. The browser's address bar shows a URL starting with 'http://...'. The application has a search bar at the top with a 'Go' button and an 'Advanced Search' link. Below the search bar is a navigation menu with tabs: Home, Manage Documents, Share Information, Search Information, Analyze & Report, and Administration. The main content area is titled 'VIP Trade Show' and contains a form with the following fields:

- Event Type: Trade Shows
- Event Location: San Francisco
- Start Date: August 18, 2006
- End Date: August 27, 2006
- Scheduled By: acosta
- Scheduled On: August 9, 2006

Below the form, there are two sections:

- 1. Kits:** Includes instructions for creating a new kit and a table with columns 'All Created', 'Target', and 'Title'. A row shows a kit created on 8/9/2006 with a target of 8/9/2007 and the title 'Are CRM tools moving to Open Source and will enterprise CRM software companies be necessary?'. There are 'Assign New KIT To Event' and 'Delete' buttons.
- 2. Teams:** Includes instructions for creating a new team and a table with columns 'All Team Name' and 'Team Leader'. A row shows a team named 'Team Test' with a leader 'Anne Acosta'. There are 'Assign New Team To Event' and 'Delete' buttons.

At the bottom, there is an 'Add Contribution' section with a 'New Team' button.

Figure 1: Your system can be a simple web-based intranet-style interface which allows easy access for everyone involved

TECHNOLOGY RECOMMENDATIONS

The following technology recommendations are based on CIPHER's experience in conference workflow automation. These recommendations can help you improve the effectiveness of your intelligence collection efforts. You don't necessarily need to go out and buy software—often, your IT department can use existing internal resources to develop these functions.

Take care, though, that the end result fits your needs. The last thing you want is to spend time building a system that no one will use because it is cumbersome and adds work to an already time-constrained activity.

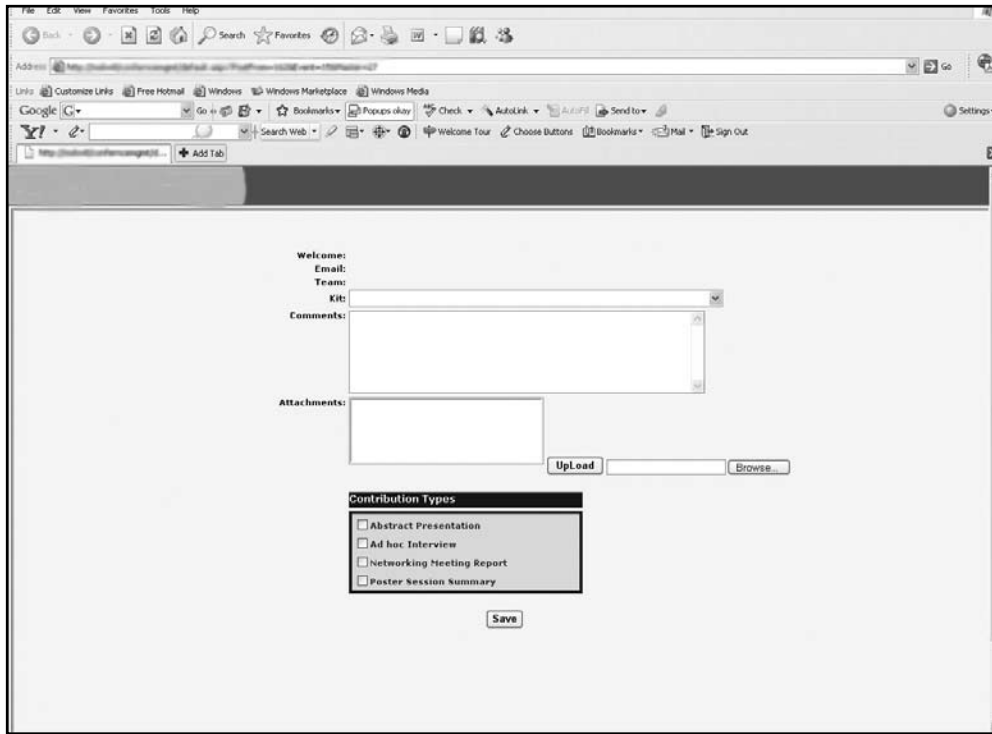


Figure 2 – An easy form accessed by email is the way ahead

and validate information from users on a daily basis during the conference. You have only a limited window of opportunity to collect information during specific events (interviews, presentations, poster presentations) and staying on top of everyone's contribution during the event is a major challenge.

Manage the security (access control) and sensitivity (quality control) aspects of all information before, during, and after a conference. Because of the sensitivity of the information collected, review the source, reliability, and quality of the information provided by each of your team members before you publish that information to the rest of your organization.

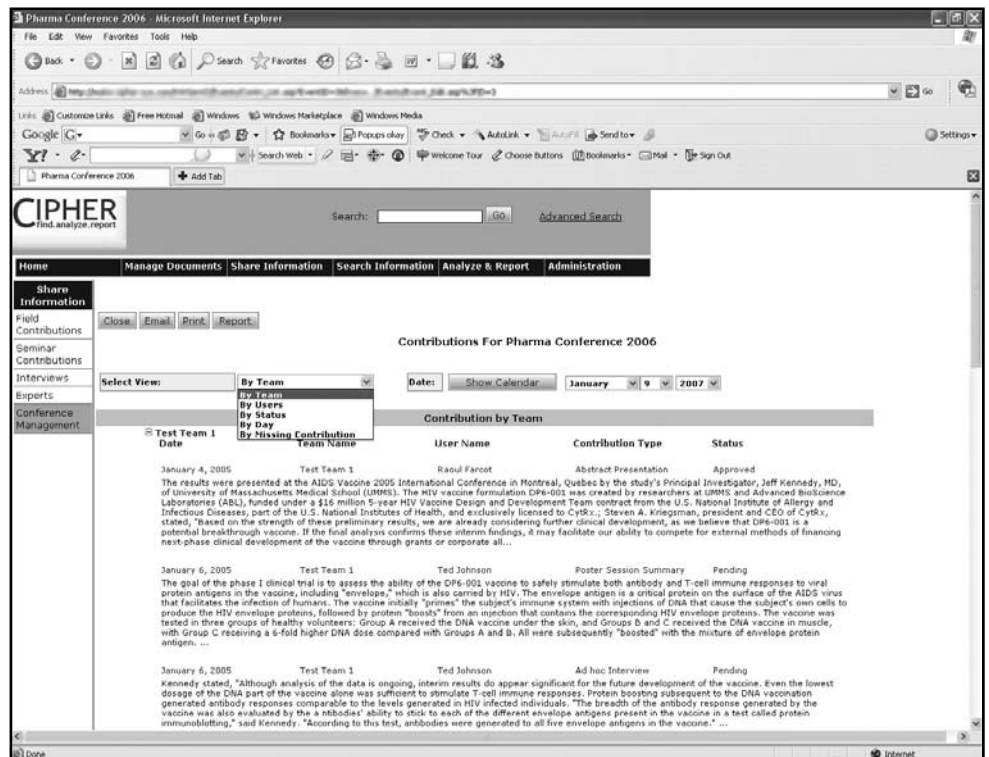


Figure 3 – Once sent in, each contribution should enter a searchable database

Create a Web-based “Conference Manager”, built in a relational database structure, to allow users to store and index the key characteristics of an event as well as the specific contributors and documents associated with an event. Integrate your Conference Manager with your company’s address book or internal e-mail directory to help competitive intelligence users to create collection teams during a specific event.

For example, you might wish to include in this database names, locations, sponsors, and relevant competitive intelligence topics or questions associated with an event. (See figure 1 for an example of how this may look.) This input allows you to better organize the preliminary information and adequately prepare for the show.

To minimize time and users’ involvement, implement a system capable of generating URLs (Web links). Forward these links via e-mail to users who can then access their specific assignments from their inbox without having to log onto a database during a conference. (See figure 2 for an example.) To maintain security and confidentiality, make sure that the link you are sending is IP-specific and can be accessed only by the person who has been assigned the questions and assignments.

By the same token, issuing user-specific input links also allows the database to automatically sort contributions by individuals. As seen in figure 3, this can help you to quickly determine which people have completed their assignments and who still owes you information on a specific topic.

Create an information staging area that allows you to preview and validate information before publishing it in your conference report. Based on experience, the default access status of any conference contribution should be restricted to the competitive intelligence manager. The manager will then determine if the information should be published into the database and/or admitted into a conference report.

This prevents sensitive or irrelevant data from entering the main public repository.

Finally, hold a post-conference meeting with attendees to capture any further impressions they developed about the event. This meeting will allow you to supplement the main conference data with other potentially valuable observations.

Following these recommendations should improve the level of success at your company’s next show attendance.

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Elizondo and Glitman continued from page 43

happens, the junior person is often kept close and can hear the conversation, so a later approach by another member of the CI team can sometimes lead to a successful data collection effort.

Although the educational component is often a lower priority at the larger non-U.S. shows, exhibitors often give presentations. These presentations are similar in some ways to the U.S. investor conferences or a broad sales pitch. Once they are completed, the presenter often will leave behind copies of their talk. Through discussions with the presenter, you can sometimes receive an invitation to the behind-the-scenes activities at the exhibitor booth. Once in the private rooms at the booth, much

more information is available, but here it becomes even more important to remember what is ethical during these discussions.

Non-U.S. trade shows often feature social areas, especially in the larger events. Many of the larger exhibitors will have a fully staffed bar that serves as a focus for attendee socialization. Usually, the exhibitor staff is not in this area so it is less of an opportunity for data collection than it first seems. Other attendees often review their notes at these locations and careful listening can uncover some insight, as can engaging the attendees in conversation.

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