

Collection Primer – Capturing Field Competitive Intelligence



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All companies theoretically have access to the same fee-based and free information sources. It is simply a matter of resources, organization and data selection. Consequently, the most valuable information is actually not printed nor extracted from any database. It is captured from primary sources both internal and external to the organization.

Here we consider sales and field input in particular. This information collected both formally and informally everyday by field personnel should be a key component in every organization's market information gathering strategy. This information can provide the CI analyst with a significant advantage for many reasons including the following.

Field Intelligence:

- Constitutes a key component of an organization's Early Warning system
- Uncovers hard to find unpublished facts
- Helps intelligence professionals validate or refute information collected from secondary sources
- Highlights information and skills gaps in the field

You cannot get the complete picture without taking intelligence from the field into account. These are details that simply cannot be ignored. Herein we find one of the most challenging tasks for CI professionals. That is how to effectively motivate sales and field personnel to contribute to the CI effort at large.

Based on our experience working with CI departments across industries, there are three critical success factors that must be addressed to successfully leverage primary information sources like sales and field personnel.

Critical Success Factors for Capturing Field Intelligence:

- Elicit Leadership Buy In
- Promote CI Efforts Mapped to Sales Campaigns
- Use Existing Communication Channels

Elicit Leadership Buy In

Most company employees are unlikely to spend much time focused on tasks they do not feel they will be recognized for. This is especially true for efforts that do not appear to be championed by management at any level. Therefore, the first critical success factor you must consider is eliciting buy in from your organization's leaders.

You must get executive management involved. Educate them about the importance of CI and show them how it must be everyone's responsibility if it is to be effective. Consider the following tactics to enable executives to get all levels of management on board and subsequently all levels of personnel. Make it easy for everyone to promote CI.

Tips and Techniques

- Create a brief executive presentation that uses specific ROI examples to show executive management the importance of CI. Get on management calendars to review.

- Draft an email stating why and how CI can impact the performance of the organization. Include specific next steps to set up future education and promotion efforts. Have an executive management team member sign and send the email to all employees.
- Coach district and/or corporate management on CI strategy and process. Give them a slide or two to include in all sales review meetings.
- Promote CI success stories to all levels of management through internal newsletters.
- Work with management and HR to integrate CI efforts into existing review and incentive plans.

Promote CI Efforts Mapped to Sales Campaigns

The members of your sales force and other field personnel are most motivated by factors directly impacting their market and the compensation they receive for their ability to respond. These groups are typically competitive by nature and are very focused on generating revenue. It is often difficult for them to see the value in efforts that may seem intangible in terms of immediate results.

If you promote CI in light of campaigns they can relate to, you will have a better chance of garnering participation. In this context they not only relate to the topics being considered, but they can better see exactly how the information being collected is relevant to their jobs. There is a more immediate recognition that added insight resulting from their collective input might in fact help them improve performance and subsequently maximize their returns.

An example of this might include tying in CI collection efforts and research studies with promotional sales campaigns. For example, if your sales force currently has an added incentive program to push Product X – now would be a good time to consider research questions that are related to that or competing products. In this case the sales force is immersed in the details of selling the product and you have a great opportunity to not only tap into that reservoir of topical knowledge but also have the benefit of a captive audience.

Use Existing Communication Channels

While it is true of any employee, sales personnel in particular do not have the bandwidth to learn and use additional tools just so you can get the information you need to feed the intelligence process. Therefore, you need to make sure that your CI program taps into existing communication channels. The key is to not create any additional work or force new processes on field personnel. This never works.

The actual selection of the portfolio of techniques used to capture information from tacit sources is highly contingent. You need to keep in mind not only the current processes and tools being used by field personnel but also the overall corporate culture of your organization. You must adapt the following tips and techniques with these factors in mind.

Tips and Techniques

- Set up an email address that feeds a central repository of information. Field personnel can then quickly send details via email and the input can be automatically indexed for subsequent searching.
- Create a simple interface that allows field personnel to submit information directly from their PDAs or other remote messaging devices.
- Make submitting details off-line easy. Use familiar technology like PDF forms to allow users to complete field reports. They can enter the details from anywhere, even while traveling, and then automatically submit them to a central repository when they return to the office.
- Leverage call centers. Train call center operators who already receive calls from field personnel to quickly prompt for CI information at the end of each call. They can use predefined forms or templates to electronically submit the details captured.
- Take advantage of technology investments. For example, are you already using voice to text technology to support voicemail to email translation? If so, consider how this might be used for CI. With this example you can have a voicemail channel for field personnel to submit intelligence directly into an electronic repository. Think about other technologies in use and how they might apply.

Sales and field personnel are most successful when they stay focused on their core responsibilities. So, while their input is extremely valuable to your CI efforts, you don't want to do or change anything that will ultimately detract from their overall effectiveness. Instead, consider ways you can proactively structure your CI function to take advantage of executive support, corporate initiatives and existing technologies and processes.



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