

USING RESEARCH TEMPLATES TO BUILD PRACTICAL CI SKILLS

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Having worked with multiple corporate research organizations, I have noticed that the majority of research analysts need practical guidance to address these CI production cycle phases:

- Turning management's requests for information into clearly defined and actionable intelligence questions
- Identifying the most appropriate sources of information to address new assignments
- Turning raw information into a professional and concise report that can be easily read and understood by management

KNOWING WHAT TO ASK

CI professionals must be ready to address a wide range of information requests on a daily basis. Regardless of their industry sector or CI department size, CI professionals often spend 90% of their time focusing on a standard and recurring set of intelligence assignments.

Taking this reasoning one step further, these assignments can be broken up into a series of standard questions. For instance, some of the most commonly asked competitor profile questions include but are not limited to the following:

- Who are their executives?
- What are their most recent financial results?
- Who are their leading distributors?
- What new technologies are being acquired or developed?
- What are their production sites?

Although all CI assignments do not neatly fit into a pre-defined list of questions, this approach can still be an effective way to help analysts convert the most frequent information requested into a set of clear and actionable CI questions. First create a list of the most common types of assignments typically handed to the CI staff (competitive profile, market assessment, etc). From these create an exhaustive list of CI questions related to each assignment category, as shown in the competitive profile example above.

Once the question templates are available, an analyst simply selects the most relevant pre-defined queries for the new assignment. For instance, if a decision-maker asked for "everything you can find on Company X," the analyst would simply access the company profile template and select the most appropriate questions listed under this assignment category. To enrich the process over time, an analyst would also have the option of creating questions and adding them to the template.

KNOWING WHERE TO SEARCH AND WHAT TO SEARCH FOR

Research templates can also provide a very effective collection guide for CI analysis. During this phase of the workflow, the most experienced researchers or subject matter experts in the CI department assign a list of pre-identified information sources to each of the questions listed in a specific research template category. The target list could include secondary or web based sources as well as primary information sources. Each analyst then queries the recommended sources and retrieves information related to the assigned questions.

KNOWING HOW TO PRESENT INFORMATION

A structured library of research templates can also help analysts publish professional CI reports in a format that meets management's expectations. In this final phase of the methodology, a manager designs a specific formatting guide to publish the information retrieved by each analyst. One of the advantages of this *pre-published* approach is the ability to control the quality of the published reports and create a series of standard and *branded publications* with a unique format, thus enhancing the visibility of the CI department. (See Fiora this issue.)

PUTTING IT ALL TOGETHER

A template based research methodology can provide an effective on-the-job training guide for CI analysts across industry sectors. It can also help CI managers control the cost and the quality of the reports being produced by his research department.

Today, software technology can be used to automate the template methodology at a reasonable cost. An effective electronic support system can help each researcher to automatically search, retrieve, and publish information in order to focus on producing added value analysis.

Raoul Farcot is vice president at Cipher Systems. He is currently responsible for designing Cipher's next generation reporting tool based on the template methodology. Raoul can be reached at r.farcot@cipher-sys.com.