How I Perceive IAFIE...
Compared to IAFIE I am...

“Constructively Annoying”
THESE ARE MY BIASES AND GENERALIZATIONS!

WARNING!
Many

Few

Data Collection

Intel Processing

Analysis / Predictions

Recommendations

Insight

Government: Scope of Individual Intelligence Competency

Number of People

Competency
Business: Scope of Individual Intelligence Competency

Many

Data Collection

Intel Processing

Analysis / Predictions

Recommendations

Wisdom

Few

Number of People

Competency
What Differentiates the Quality and Use of Competitive Intelligence (CI)?

THE PERSON DOING THE JOB

THIS IS NOT A JOB FOR EVERYONE
It’s About People Not Process…

- There is more emphasis on acquiring and implementing intelligence systems and processes than a effort to improve the skills of an employee.

- Situations vary for CI professionals. They are solo practitioners, small groups, or in large enterprises doing their best with what they have.
Some Realities of CI
Internal Reality: Mistakes Happen – NOT Meeting Intelligence Needs Of Decision-makers (not good!)

- Selecting first answer that appears “good enough.”
- Focusing on a narrow range of alternatives that ignore the need for change.
- Choosing the answer that appears most likely to avoid some previous error.
- Opting for answer that elicits the greatest agreement and support.
- We ignore it completely.
Why Where These Mistakes Happening?

- We lack the skills and incentives to turn collected information into analyzed intelligence.
- We lack the confidence to tell management what we think.
- We are afraid to give bad news or challenge current situations.
- We assume they already know it.
- We don’t think the end-user wants us to provide challenging alternatives.
Internal Reality: Size, Support, Background -
Dozens of Independent Intel and Business Units

Impact of intel varied (strategic, tactical, technical)
Inconsistent backgrounds and training
Intel personnel unprotected
Inefficient use of resources
Also know as…

- Library researchers
- Snitches
- Inspector General Office
- Dumpster-divers
- A worldwide global spy network which knows everything, about competitors in every country
- Researchers for kids school homework, MBAs, or stock quotes
- A Knowledge Management System
Internal Reality: Decision-makers Must Act In A Complex And Dynamic Global Competitive Environment

The Mean Time between DECISIONS Is Greater than the Mean Time between SURPRISES
Internal Reality: Intel End-Users Attention Span Was Shortening

Last Quarter “The Middle Ages”

Now “$$$$$”

Next Quarter “The Colonization of Mars”
Career Ladder and Core Competencies for CI
Can competitive intelligence be positioned as a unique function, staffed by unique people?

Can we define the characteristics of a CI professional and construct a viable career path?
Career Management Formation Process

- **Core team formed to quarterback issue**
  - Volunteers from major units, HR, Finance, and outside CI
  - Obtained support from management

- **Surveys**
  - Surveys of CI community
  - ID and validate needs, issues, community members

- **Benchmark**
  - External data on other career efforts

- **Communication**
  - Conference calls
  - Presented at global intel meetings, core business leaders
What Skills and Characteristics Delineate An Effective CI Professional?

**Competencies:** Characteristics of an individual that are important for effectively performing one’s job.

**Functional Expertise:** Attributes that can make the greatest difference in performance and are critical for predicting intelligence effectiveness.

**Personal Traits:** Fundamental traits that delineate the knowledge, skills, abilities, experience, and characteristics that define intelligence performance.

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Communicating, Teaming, Collaboration, Organizational knowledge

Abilities

Target Knowledge, Intelligence Community, Plans and policy, Customers, Analytic Resource

Knowledge


Skills

David Moore and Lisa Krizan, Department of Defense:
“Core Competencies for Intelligence Analysis.” 2002
Personal Traits
Needed in a Competitive Intelligence Professional

Communicating
Teaming
Collaboration
Organizational knowledge

Abilities

Personal Traits
Insatiably Curious
Intuition
Self-Motivated
Ethical
Observant
Fighting spirit
Obsessed (fruitfully)
Takes outsiders viewpoint
Makes creative connections
Objectivity
Sense of humor
Sense of wonder
Concentrates intensely
Questions convention

Knowledge
Target Knowledge
Intelligence
Community
Plans and policy
Customers
Analytic Resource

Critical Thinking
Literacy
Computer Literacy
Foreign Language
Research
Information Gathering and Manipulation
Project/Process Management

Skills

David Moore and Lisa Krizan, Department of Defense:
“Core Competencies for Intelligence Analysis.” 2002

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Critical Success Qualities at Intersections

Intuition
- Common Sense
- Instincts
- Curiosity
- Knowledge

Data
- Education
- Facts
- Analysis
- Experience

Competencies
- Functional Expertise
- Personal Traits
### Key Functional Skills And Traits Essential To Intel Professional Performance And Career Growth

<table>
<thead>
<tr>
<th>Function</th>
<th>Conceptual Understanding</th>
<th>Experience</th>
<th>Expertise</th>
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<tbody>
<tr>
<td>Data Collection Techniques</td>
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<td>Human Collection Techniques</td>
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<td>Understanding Processes</td>
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<td>Analytical Skills</td>
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<td>External Environment</td>
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<td>Competitors</td>
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<td>Internal Organization</td>
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<td>Marketing Knowledge</td>
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<td>BI Information Systems</td>
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<tr>
<td>Surveying/Benchmarking</td>
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<td>Project Management</td>
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<td>Written Skills</td>
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<td>Verbal Skills</td>
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<tr>
<td>Internal Business Knowledge</td>
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<td>BI Training</td>
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<tr>
<td>Negotiation Skills</td>
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</tbody>
</table>
Description of Mission-Critical Leadership Standards
Sample Behavioral Queries (48 Q’s total)

Fuels Business Decision-making (2.8 - 3.3)

- Applies a consistent process to create and evaluate customer needs and initiatives to identify total solutions
- Applies an evaluation process to assess strengths, weaknesses, opportunities, and potential threats for each competitor

Builds Effective Partnerships (2.5 – 3.3)

- Builds and maintains a broad network of relationships with business partners and other important third parties
- Establishes credibility and trust in all executive level interactions

Targets the Competition and Industry (2.6 - 3.0)

- Identifies new competitors that may be encountered based on the way the business is changing
- Identifies competitors and their strategies

1- Rarely demonstrates behavior, 4 – Consistently and effectively demonstrates the behavior and teaches and encourages others
Understands Role Within Business Environment (2.4 – 2.8)

- An understanding of business, strategic objectives, personnel, practices, and history
- Obtains the appropriate internal resources and subject matter experts to advance issues and the intel process

Leads Courageously (2.1 – 3.0)

- Has a strong sense of purpose and accomplishment in intel activities
- Challenges existing practices/status quo

Communicates Effectively and with Passion (2.7 – 2.8)

- Applies a consistent process to create and evaluate customer needs and initiatives to identify total solutions
- Applies an evaluation process to assess strengths, weaknesses, opportunities, and potential threats for the company and each competitor

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1- Rarely demonstrates behavior, 4 – Consistently and effectively demonstrates the behavior and teaches and encourages others

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Result: Five Levels of CI Careers Created and APPROVED

Business Intelligence Specialist
Business Intelligence Analyst
Manager, Business Intelligence
Director, Business Intelligence
Vice President, Business Intelligence

Handbook created:
- Fundamental responsibilities and guidelines
- Code of Conduct, Ethics Policy
- Training Curriculum
Real Benefits: Tradeshow Exploitation

- Launched coordinated cross-company conference exploitation CI effort
  - Dedicated collectors and analysts (15-20) from all relevant business units
- Pre-show tasks, requirements, training
- Global access to information
Intelligence for Market and Product Line Planning: Identify, Plan, and Fund Products for Customers/Markets
What About Certification For CI?

- SCIP
  - Codify Body of Knowledge
  - SCIP University

- Academy of Competitive Intelligence

- Institute for Competitive Intelligence
Final Thoughts

- Professional development and career progression result from an increase in knowledge, skills, and experience.

- This increase in skillset is directly related to improved and consistent production of quality analysis, implications, and recommendations.

- This creates value for our end-users and the establishment of a meaningful, substantive job.

- The institutionalization of intelligence careers is an iterative process requiring constant effort.
THANK YOU

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