



INTEGRATION OF CUSTOMER INSIGHTS, EXPERIENCE, AND CI

THE CORNERSTONE OF CI EVOLUTION

By Anca Costea and Monica Angelova

In an effort to cope with current economic and industry-wide challenges, CI/MI/MR practitioners are moving towards integrating functions, teams, and practice models to provide effective support to decision-makers. Integration is multi-faceted, ranging from simple to complex merging of capabilities & competencies, scaling up to full restructuring and redesign of work practices. All these efforts seek to provide added value. Against this context, many companies and practitioners are in a state of flux, looking for guidance and best practices around integration models that can maximize the value of collecting and disseminating insights.

To help fill this gap in the CI industry, SCIP

developed a targeted agenda for the 19th Annual Strategic and Competitive Intelligence Professionals Summit held in Amsterdam between November 3 – 5. The agenda focused on integrated intelligence as the driver of the evolving roadmap to effective decision-making. As part of this targeted effort, several sessions explored the idea of integration from various angles, and one in particular provided a deep-dive on Customer Insights, Experience and CI Integration.

This was a half-day workshop delivered on Monday, November 3 by Monica Angelova and Anca Costea, who engaged the audience through a variety of case studies, interactive exercises, group discussions, and best practice sharing.

The objectives of the workshop were to provide the following:

Overview of Customer Experience, Customer Insights & CI, understanding of where they fit in relation to each other

Basic understanding of traditional and innovative tools (approaches) to gain insights

In-depth exploration of integration, fundamentals for how to get there, potential for synergies, enablers & roadblocks

Hands-on exercises to apply new knowledge and design an integrated approach to monitor consumer & market dynamics

The participants who attended the session represented a mix of industries including healthcare, IT, professional services, travel, banking and financial services. Their level of experience conducting competitive intelligence varied from 0-3 years to 15 and above, and their titles ranged from manager to senior director and principal. All attendees were highly engaged throughout the workshop, enjoying the best practice sharing as well as the interactive exercises.

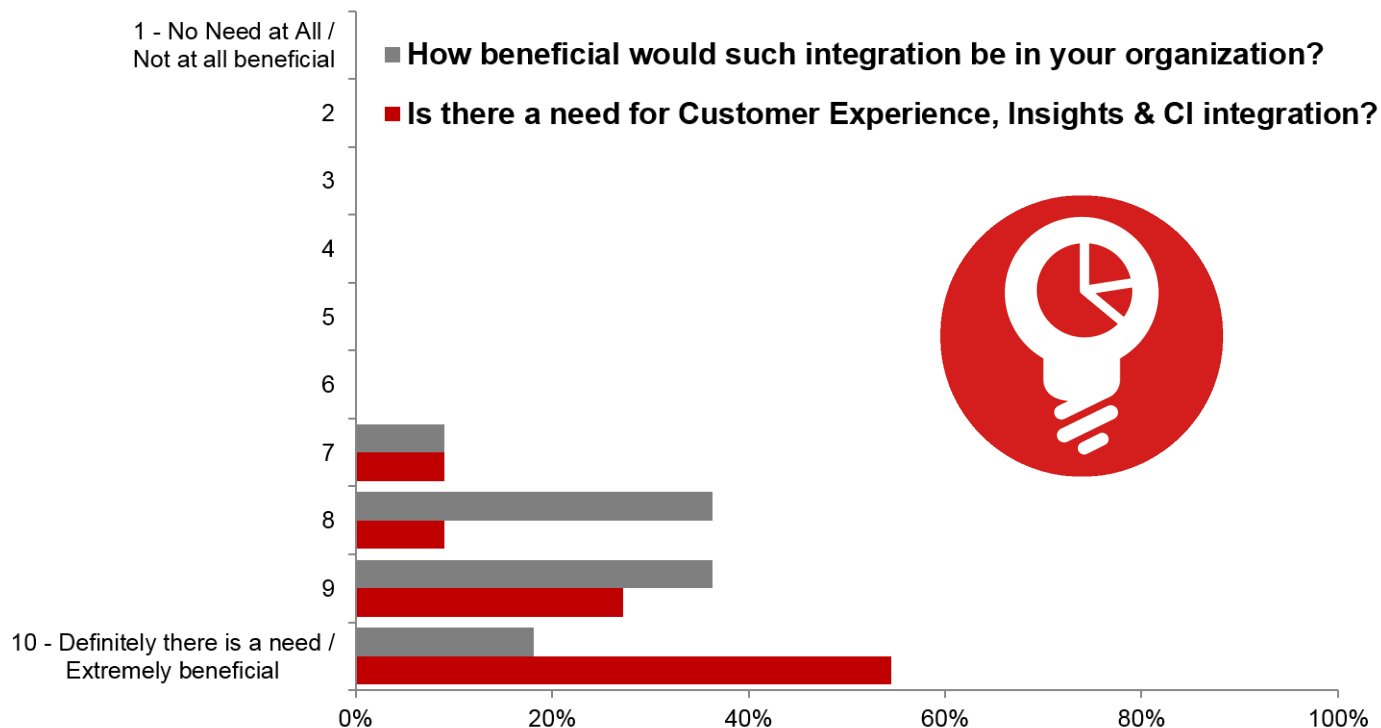
One such exercise took the form of a brief questionnaire designed with the intent to uncover current CI processes, practices, and potential challenges in participants' organizations. The questions were grouped around three main categories including:

- **Collection of customer insights**
- **Integration of customer insights and customer**
- **Dissemination of intelligence experience with CI**

The following pages will provide a detailed overview of the main themes identified through this exercise and how they tie into the topic of the workshop: Customer Insights, Experience and CI Integration.

INTEGRATION OF CUSTOMER EXPERIENCE, INSIGHTS AND CI NEEDED AND HIGHLY BENEFICIAL

The integration of Customer Experience, Insights, and CI is a fascinating subject and over half of the workshop attendees firmly believe in their overlap. Yet, in many companies the challenge comes from the fact that CI is set up as a separate function with limited or no interaction with MR or customer insights. As a result, individuals serving these different functions do not share knowledge and resources. Companies end up purchasing the same reports and professionals end up working on similar projects without sharing the insights generated. Needless to say, most of the respondents in our questionnaire consider integration extremely helpful in terms of the benefits it would provide to internal shareholders.



It is important to note that while customer insight collection is largely present at most organizations represented by those surveyed, channels and methods used vary widely. The data collection methods used may take the form of qualitative research such as in-depth interviews and focus groups. Quantitative research such as NPS and

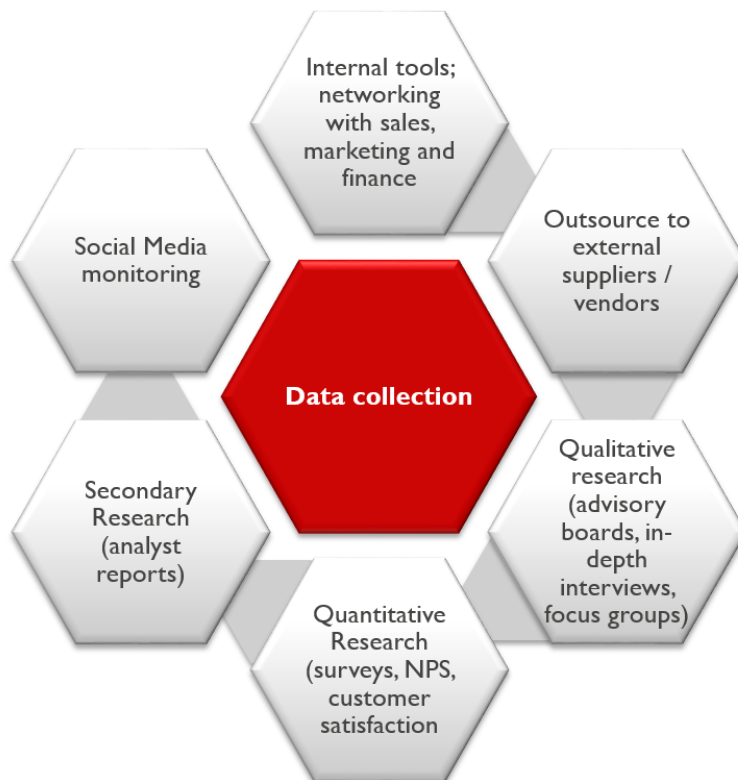
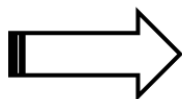
customer satisfaction surveys are also included in the mix. Participants also mention triangulation of secondary data from analyst and industry reports, social media monitoring, internal tools creation, and outsourcing to external vendors.

Q3. Do you currently have systematic and ongoing customer insights collection at your organization?

Base: 11

90% - YES

10% - NO



Q4. If yes, what kind of processes do you use for customer insights collection?

Base: 10

HOWEVER, SEVERAL CHALLENGES ARE LIKELY TO COME IN THE WAY OF SUCCESSFUL INTEGRATION

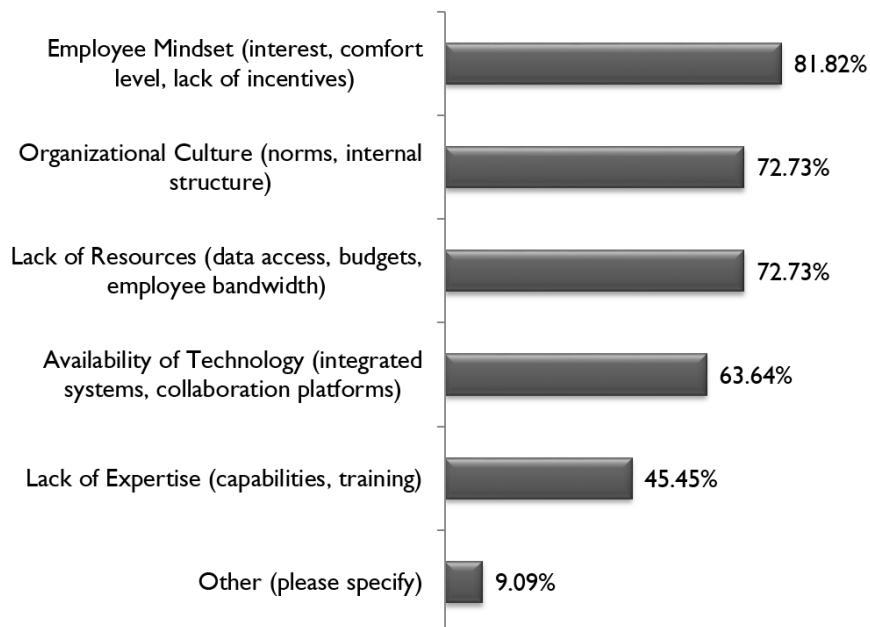
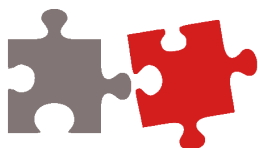
Integration of the CI discipline with Customer Experience and Customer Insights is a challenging task which depends on numerous factors such as the company environment, resources, and champions who will drive that change. As expected, all professionals responded that they have faced challenges when integrating CI and Customer Insights data. Most often the reasons quoted are related to the employee mindset, organizational culture, and lack of resources.

Q5. Have you ever experienced challenges when integrating customer insights with CI?

Base: 11

100% - YES

0% - NO



Q6. [IF yes above] Which of the following types of challenges did you experience?

Base: 11

While using synergies has its advantages and its disadvantages, there are certain enablers and roadblocks of integration. Before any successful integration, all points need to be taken into account in terms of what may help and what may hinder the integration process.

It is critical to consider the key enablers and roadblocks in an organization and plan accordingly to ensure appropriate frameworks and capabilities are in place to support integration. Experience shows that some of the key prerequisites for an organization to achieve integration include complete understanding of expertise, resources, technology, corporate culture and mindset. Culture and mindset, in particular, have been identified as both a show-stopper and an enabler.

In fact, a lot of discussion during the workshop

centered around the fact that integration is an ongoing process that kick starts with a change in mentality and an openness to embrace a new model of collecting and disseminating insights. As one of our participants bluntly put it: "The fuel that sparks integration and collaboration does not lie in technology but in individuals' proactivity to embrace change, evolve mindsets, and think about CI professionals and their job responsibilities in a holistic way, considering the value add of integrating insights, competencies, and capabilities."

In terms of enablers of Customer Experience, Insights, and CI Integration, most professionals

agree that technology and availability of IT infrastructure such as knowledge management systems and collaboration platforms are important. However, technology is unanimously identified as the least important element. The survey responses along with the group discussions confirm that the leading components that enable the integration process are expertise, culture and mindset, as well as resources such as budgets, talent, and data access.

INTEGRATION EFFORTS RELY ON KNOWLEDGE MANAGEMENT SYSTEMS AND CROSS-FUNCTIONAL COLLABORATIONS

Various integration approaches were discussed during the workshop and also cited in the survey. The two most frequently mentioned include the implementation of knowledge management

systems and the set-up of cross-functional initiatives and collaborations.

The methods currently employed by the participants in the workshop can be divided into three groups. The first one is related to establishing an internal network of trusted individuals which allows for an exchange of information. Other possibilities that allow for an exchange of information across an organization include a company Intranet to share information, company dashboards or various knowledge management systems, and market research portals. The second integration method is around building and designing unified systems and internal frameworks that enable information sharing across projects and functions. For obvious reasons, such unified systems go hand in hand with internal networking and collaboration among individuals and functions. The third integration approach is the old and tested method of 'face-to-face' interactions that allow for the sharing and vetting of information, discussion of implications, building consensus and team spirit. Such interactions can range from formal yearly processes such as strategic and operational planning, to regular marketing meetings, or ad-hoc cross-functional meetings.

Knowledge management systems and regularly scheduled face-to-face meetings also stand out in terms of disseminating intelligence across the different departments of an organization. Common practices include, but are not limited to, delivering alerts and newsletters via a company's Intranet and providing publications across the company in the form of reports and dashboards. Ad-hoc requests are also a common way to disseminate intelligence.



Knowledge management platforms such as:

- **Research & Intelligence**
- **Market Research Portal**

**Intranet
(alerts + newsletters),
Datastream**

**Regular publications
(reports, dashboards)**

**Weekly / monthly /
quarterly face to face
meetings or councils**

Ad-hoc / custom requests

Q9. How do you disseminate intelligence across different departments in your organization?

The discussions during the workshop and the responses to the short questionnaire came to validate one of our main assumptions: **integration of the different intelligence disciplines is needed and beneficial but challenging to implement.** One of the biggest hurdles for intelligence professionals remains to develop practices to turn customer insights and CI into actionable recommendations that will support decision-making. This is work in progress and further interest and focus is encouraged. This could take various forms from academic research and publications, to hands-on workshops and educational sessions. Some potential topics to be addressed include best practices, analytical tools and processes to support integration, evaluation and vetting of solution providers offering comprehensive solutions for integration, and case studies of successful integration processes. However, the list is vast and open for your additions.

What else would you be interested to learn? Feel free to send us your suggestions at:

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Monica Angelova is the Founder and Managing Director of Intelligence Pathways. She has extensive international experience in consulting, business intelligence and marketing research. Her work stretches over a variety of industries among which healthcare, media, government procurement and IT. A proven team leader and business development professional, Monica has built, managed and lead teams of experts working on multinational assignments. She has experience in consulting companies on strategic outsourcing initiatives and thus helped the clients to increase revenues by lowering costs. Monica understands every detail of back office outsourcing support and has the knowhow of implementing it on an international scale. She holds an M.B.A. from the University of Maine, USA.

Anca Costea spent the last 10 years integrating MR methodologies within the larger umbrella of MI/CI. Having worked on both agency and client sides, focusing primarily on the pharmaceutical and medical device industries, Anca has first-hand knowledge of current industry challenges and best practices to address them through innovative MR approaches, sound market analysis and competitive intelligence. Her extensive international experience coupled with solid understanding of business operations, strategic planning, marketing and business development, enable Anca to develop insightful recommendations and solutions that place clients in leadership positions. A featured speaker in the US, Europe and Latin America, Anca is the 2009 recipient of the Frank Staggers Award for Excellence in Marketing Research, and holds a Master's degree in Marketing Research from Southern Illinois University Edwardsville where she graduated with a 4.0 GPA.

