'Calling All Members:'
Getting increased recognition and budget for your CI and event intelligence program

by Jonathan Calof
The last week of February was an interesting week of contrasts for me. It started with an email from a very frustrated CI professional that, due to lack of support, could not proceed with an event intelligence training initiative and ended with me doing some training for another CI professional who had launched a major CI initiative thanks to a new six figure investment that his organization was making in CI. In the first situation, management was balking at letting the CI professional spend their budget on a proposed trade show training initiative, while in the second case, senior management was investing heavily in intelligence training including trade show intelligence.

Getting top management support/buy-in for competitive intelligence and trade show intelligence is something that is top of mind for many competitive intelligence professionals. I mentioned this many years ago in a 2008 column called, “Dear C: Please give me resources for a trade show intelligence program,” and even earlier in a 1999 article entitled, “Overcoming Competitive Intelligence Barriers: A SCIP Tool Kit.” Yet it’s 2018, and as mentioned in my last column, the question of how to get top management commitment to CI, how to get CI increased attention and responsibility was something that was asked by many participants at multiple SCIP European sessions. So what are we going to do about it? Well, this is the first in what I hope will be a multi-part series that sees us working together to help address this important issue. Here is how I am proposing to tackle it:

1. In this column, I will provide a few tips from my experience trying to get management buy-in for event intelligence. I have been brought in many times to help convince management about the potential value of event intelligence. I have given speeches about it to CEO’s and other “C’s” at various industry gatherings and given talking points to CI members. Given how many times I had been asked to help build support for event intelligence, I wrote an article about it called, “Dear C: Please give me resources for a trade show intelligence program.” The basic problem I deal with when trying to build support for event intelligence can be broken down into two categories:

   1) Management has a low opinion of the value of trade shows in general. They send staff to them/have booths, because the feeling is that if you are not seen there, then it sends a bad message to the industry. But I keep hearing from “C” levels that trade shows generally have low ROI’s, and they are reluctant to invest more in them.

   2) Management does not always understand what competitive intelligence is or the huge return that event intelligence can provide.

2. For those SCIP members who will be in Orlando for SCIP’s 33rd Annual International Conference and Exhibition in May, I will be hosting a lunch table on trade show intelligence on Wednesday, May 16th. I am going to start the lunch session by asking everyone to share their successes and failures in getting top management support for event intelligence and for CI and will then try to generate lessons learned from the group. I will share the ideas generated in one of my upcoming columns. If you will be at SCIP Orlando, please join me on Wednesday and share your ideas.

3. I ask all those who read this article to email me their experiences and ideas of what works to get top management commitment for Competitive Intelligence and trade show intelligence (make it two separate lists). How did you do it? What are your lessons learned? Email these to me at calof@telfer.uottawa.ca and I will share the ideas in an upcoming column.

Bottom line, I am going to provide a few tips in this article, but my focus is going to be on getting CI professionals and SCIP members to share their experiences and then provide these lessons learned in an upcoming article. This is a very important issue for CI, and I hope I can count on those reading this article to email me or share with me at the upcoming SCIP conference. We need to get CI practitioners to share their thoughts!

A few Calof ideas

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Give management lots of (overwhelming) evidence on the value of event intelligence. I have used quotes from past SCIP member presentations, books, articles, etc. Here is a quote I have used from Motorola about the value they get from event intelligence:

“Conference and trade show events are the most concentrated, productive and cost-effective means to spotlight strategic trends, and they often go unnoticed in normal intelligence activities. Trade shows, conferences, and seminars furnish the greatest collection potential in the shortest span of time for the least amount of money. The many formal and informal activities at the event provide a variety of collection opportunities. Over the years, a small community of business intelligence (BI) experts within Motorola has made the most of trade events as a primary collection opportunity.” (Goldberg and Barak, 2007)

I also provide examples of what I have (and others) “uncovered” at events:

- Found joint venture partners
- Identified new markets
- Created new product and service opportunities
- Identified threats
- Obtained new market insights
- Pursued sales opportunities
- Obtained intelligence needed to make key decisions

Tip 1: Don’t mention intelligence; mention how you can help their trade show initiatives

In terms of “selling” trade show intelligence, I have built support for event intelligence by positioning it not as intelligence but as a better way to manage and help the organization’s trade show efforts. Many of my columns have looked at how CI can support trade show teams, helping the booth staff better deal with the potential customers approaching the booth, profiling techniques, interview support and so forth. The idea being let’s not call it intelligence but look at how CI’s skills, knowledge and approaches can be used to support the organizations trade show teams objectives.

Tip 2: Provide overwhelming evidence of the value that event intelligence can provide

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Tip 3: Show them how a few upcoming events can be of value to their intelligence/ information/ decision making needs

I have spent a lot of time helping the C realize that the intelligence they say they need is at a particular trade show. How do I do that? If I truly understand what the C’s intelligence needs are, I find two or three show’s that I think will have the information needed and then bring the trade show schedules/materials to them. I show them the sessions that will be at the event, the exhibitors, the overall program, and ask them and talk to them about the information that may be at each of these “sites” that would be of importance to them. In short, I try to get the C to realize the immense opportunity of event intelligence by getting them (the C) to identify the opportunities at the event for intelligence that could be of importance to them. I also discuss, as mentioned above, how CI can support the existing trade show objectives, as this is a value.

If you are going to do this, make sure you go broad and creative when showing the C the opportunities for the event. For example, when you show them the name and description of a session or workshop with speakers:

1) Show them the title, and ask if the information being presented appears pertinent for their intelligence needs.

2) Get the C focused on the speakers themselves, and ask if the speakers are relevant to their intelligence needs. “Are there any questions you want me to ask the speaker?” Even if the topic itself is not relevant, the speakers may be important to the C’s intelligence needs.

3) Talk to the C about the people that may be at the session (for some show’s you can get a list of people who have signed up for the session). Will the people who attend the session be people that the C wants to...
References

ABOUT THE AUTHOR
Jonathan Calof is a full professor of Strategy and International Market Insight at the Telfer School of Management at the University of Ottawa; extraordinary professor at North West University in South Africa, Leading Research Fellow at the National Research University, Higher School of Economics in Moscow and Adjunct Professor at the University of New Brunswick. Dr. Calof combines research and consulting in competitive intelligence, foresight, and business analytics to help organizations develop key insights on their competitive environment and become more innovative. In recognition of his contribution to both professional practice and academic development in these fields Dr. Calof received the fellow’s award from the Strategic and Competitive Intelligence Professionals (SCIP), the lifetime achievement award from Frost and Sullivan and SCIP’s distinguished member award. He has over 200 publications and has given over 1000 speeches, seminars, and keynote addresses around the world on intelligence, foresight, analytics and innovation. Jonathan can be reached by email at calof@telfer.uottawa.ca or by phone at +1 (613) 228-0509.

Tip 4: Treat the “ask” as an intelligence project
You are trying to get your decision maker to make a decision. This is about providing the right intelligence to the right decision maker and having it presented by the right person in the right way to get the decision made. Without getting into too much detail, I typically, in helping CI people start or expand event intelligence initiatives, ask them to find out how the decision maker makes decisions and who do they listen to? What causes them to change their minds? Sounds like a profiling intelligence project. With this profile you (or someone else that the C trusts) should be able to make an appropriate presentation on why an investment in event intelligence is warranted.

Conclusion
Getting management buy-in for event intelligence (and intelligence in general) is an important topic for CI practitioners. I have provided four tips that I hope help, but more importantly, I am calling on SCIP members and others that read this article to provide their tips. I ask you to join me in Orlando at my trade show lunch session and share your tips or to email me your tips and experiences. Bottom line we need to work together and share our experiences in getting management buy-in. I will share your tips with those that read competitive intelligence magazine and my column. Let’s help grow our profession.