Over the past months, I have been receiving emails after a trade show from a salesman. These emails drove home why competitive intelligence professionals need to play a central role in their organizations event management process:

Email from salesman: I have e-mailed you a few times now with no response. I am thinking that I received your e-mail and number by mistake and that you are not really interested in [my product]

My response back: When I attended Pittcon, trade show, I let your rep know that this was part of a project on technology watch for ____ (organization name) so I am unsure why you are contacting me about this

Response from salesman: I don’t know what technology watch is or the project you are referring to. The information I have from the booth personnel just said that you are interested in some aspect of our technology. I don’t know anything else so I am trying to understand.

From the interchange above, it is clear that the salesman had no idea who I was, why I was at the trade show booth, or what my needs were. All they had was my name and email address. The interaction did not leave with me with a good feeling about the company.

I attended Pittcon in March in Chicago. Pittcon is a conference on laboratory science and features numerous workshops, sessions, and exhibitors dealing with laboratory equipment. I was at the show on behalf of one of my clients. Their objective was to identify future technology trends in food lab testing technology.

Given that I am a university professor and also a consultant, the approach I took when visiting booths, and in keeping with SCIP’s code of ethics, was to clearly identify who I was and why I was there:
Let me introduce myself: My name is Jonathan Calof and I am a professor at the University of Ottawa. But my purpose here is to help a client understand what the trends in food testing equipment technology are. This is part of a technology watch initiative. Can I ask you a few questions to better understand what I am looking at and what your technology direction is?

This approach was highly successful, and I was able to put together a comprehensive picture of emerging technology in food testing equipment.

Later, when I was contacted by the same company the salesman discussed earlier, it was clear he had no idea what I wanted, or who I was. From the exchange I described above, I would have thought a better, more targeted approach to me would have happened. What does this suggest for you the competitive intelligence professional? Where is the opportunity?

To start, share this story with those in your organization responsible for events. Trade show ROI is important to organizations and something that has grown in importance. In today’s hyper competitive environment, all expenses are meticulously examined, and as many members have told me, their organizations cannot afford to go to these events if some kind of value does not arise. Tell your management that this type of “problem” is not unusual (I have seen it before) and that intelligence has a lot to contribute to ensuring that this situation does not happen to your organization. Here are ways you can help:

1. **Offer to help analyze those that go to the booth.** The starting point, which is something I mentioned in an earlier column, should focus on analytics and customer profiles (Calof 2014). CI has much to contribute to this. You should offer to help the booth personnel profile those that come to the booth to identify an appropriate approach strategy after the show. There is much in the SCIP literature on how to develop profiles, and readers are urged to read up on it. Event ROI can be enhanced if those that come to your booth are profiled with the appropriate follow-up strategies. You need to consider profiling both the customer and the organization (more information on this is provided in the next recommendation).

2. **Development of booth information collection plans.** Customer analytics allows for the appropriate information to be captured at the booth. As I was able to discern during my time at the trade show booth, the booth representative was not really interested in my tech watch project or any background on the organization or me, rather, she was busy answering my questions (professionally I might add) and capturing my badge information. Put in another way, the questions required to develop the appropriate profile where not asked. This is where CI can play a big role. What information does CI say needs to have gathered so that proper profiles and follow up plans can be developed? Think about putting together a customer profile form that bother can use as the basis for information asked at the booth. Here are a few pieces of information that would help in profiling the person at the booth and their organization:

   a) Identify whether the person in the booth is a real opportunity or are they interested in something else (e.g. a competitor looking for competitor information). Barry Siskind has a good book that provides ideas on how to assess the person that approaches your booth.

   b) Get more details about the sales opportunity. Is it a current sales opportunity or, in my case, is the person there to gather information for a future sale.

   c) Figure out the person’s role in that organization as it impacts B. In this case, I was an advisor and not an employee of the organization.

   d) Learn how the organization makes their purchasing decisions.

Much of this requires the development of appropriate plans and forms. A previous column that I wrote (Formulating Your Event Intelligence Plans) and the Competitive Intelligence foundations book Conference and Trade Show Intelligence (Calof and Hohhof 2007) have several forms that readers may find helpful.
Data capture and storage assistance. In terms of the interchange that I described at Pittcon, it is clear that the information I provided to the booth personnel was not transmitted to the salesman and from what I can tell may not even have been fully recorded. Perhaps this arose because the information that I provided was not part of the boother’s information collection requirements which hopefully the CI professional will, having read this article, now be able to fix.

However, the follow up by the salesman got me thinking about what happens after the information is captured. How is it stored? How is it transmitted? It is clear in this case all the salesman got was my name and email address and that was it. What happened with all the other information I provided when I told the booth why I was there? It appeared to me based on observations at the booth that once the booth answered my questions, scanned my badge and gave me literature she then moved onto the next potential customer at the booth. She did make a few paper notes but that was it. What did she do with those notes? Why was none of this transmitted to the salesman? Why did he say he had no knowledge of what my purpose was in approaching the company? Seems to me that the salesman did not know how to get the information. Competitive intelligence can help by developing information capture forms and procedures that boother can use after they have done the interview. These procedures can also include appropriate dissemination strategies this organization clearly lost a lot of information that could have been beneficial to them. I can’t really blame the salesmen if he was not able to get the information needed to properly outreach.

Training staff on interviewing techniques/approaches: The job of a boother, while being to push product/services and answer questions from those that visit the booth, is to collect the information that will help make an eventual sale. The boother needs to ask the right questions to enable appropriate after show analysis and outreach to the potential customer. Recommendations 2 should help ensure that the right questions are asked and 3 ensure that the information is stored and transmitted appropriately. But the boother also need to know how to ask the questions and how to interview effectively, including how to read the respondent’s body language. Interviewing is a popular theme in competitive intelligence literature. For example, the conference and trade show intelligence book mentioned earlier (Calof and Hohhof 2007) has a few chapters on interviewing. CI staff should consider providing interview training for personnel or at least preparing materials on how to effectively interview for them.

Profiling assistance, identifying the right information to collect assistance in order to develop capture and storage systems, as well as training boother on how to effectively interview at events are areas where the intelligence professional can provide immediate value. Providing this kind of help can reduce the type of problems that I encountered at Pittcon and other tradeshow events. Don’t let what I saw at Pittcon happen to your organization, and at the same time, show how valuable competitive intelligence can be to your organization.

REFERENCES


Jonathan Calof is a professor of International Business and Strategy at the Telfer School of Management at University of Ottawa. He combines research and consulting in competitive intelligence, technical foresight and business analytics and co-directs Telfer’s performance management/business analytics program. Jonathan received the Fellow award from SCIP and the lifetime achievement award in competitive intelligence from Frost and Sullivan. He has close to 200 publications to his credit including co-editing the Competitive Intelligence Foundations Conference and Trade Show Intelligence book. Jonathan has given over 1000 speeches, seminars and keynote addresses around the world on intelligence and insight and has helped several companies and government agencies around the world enhance their intelligence capabilities. He can be reached at 01.613.228.0509 or calof@telfer.uottawa.ca.