

# Virtual Event Intelligence Toolkit

By Jonathan Calof, Jonathan Dunnnett and Perry Steckly

**With IntelliCon around the corner, we offer the CI community tips to help you get the most out of the conference. The article will eventually be in Competitive Intelligence Magazine.**

This article brings together two of my good intelligence friends Jonathan Dunnnett and Perry Steckly. The two Jonathans (Calof and Dunnnett) have been doing trade show intelligence training together for several years. Perry Steckly, a good friend and expert in “connecting” recently joined our team to help us prepare and then “bring” companies to virtual trade shows.

The three of us sat around the virtual table right after one of these virtual shows (leading a group of companies to a defense industry virtual trade show) and collected our best virtual trade show intelligence (VTSI) tips and ideas. This article, along with the Competitive Intelligence Magazine June 2020 article [Event Intelligence During COVID-19: Top Six Tips](#) and the SCIP webinar (available on demand) [“Maximize Your Virtual Conference ROI Using the Event Intelligence Toolkit”](#), provides you with a wealth of tips and ideas on how to take advantage of virtual event intelligence opportunities.

## The Virtual Trade Show Intelligence Opportunity – Realistic Goals

What can you accomplish at a virtual trade show? In the Event Intelligence Toolkit webinar, both Jonathan Calof (University of Ottawa) and Laurie Young (Lone Star Analysis) told the viewers that they had been able to accomplish both business development and industry learning. Developing customer insights (through conversations with customers) and networking were also doable at virtual events. Many practitioners have said that developing competitor intelligence is more difficult at virtual events, and it can be very challenging to interview difficult targets when you must communicate via a chat box. In the webinar, Dr. Calof stated that due to some of the challenges of operating in a virtual environment, “it can take twice as long to accomplish half as much. However, while that may result in decreasing the goals for the event there is also the opportunity to add additional people – friendlies to your virtual intelligence team since it does not cost anything (or much) to bring the to the event.”

To help you maximize the TSI opportunities of virtual events and navigate through their challenges, we offer the following tips.

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## Planning

The cornerstone of TSI is the idea of planning. Planning what your activities will be at the show, what booths you will go to, the sessions you will attend, who you will interview, how you will interview them and even who you will task with interviewing the target. TSI tips include things like going over all event materials (attendee list, exhibitors list, events etc.) and matching them to your organization’s intelligence needs. TSI also has a lot of resource planning tips to help you identify who should be a part of your event intelligence team, how to find and bring in [friendlies](#) to work with, and so forth. All of these TSI tips apply to VTSI, but similar to the collection tips, the virtual event environment does present certain opportunities and challenges to TSI that bring with them additional tips.

## Collection planning

- Be even more focused: as mentioned in the introduction of this article, it takes a lot longer to accomplish less so focus is key.
- Identify before the event who will be there. The TSI tip of putting a list together of who will be there still applies, but there is a real time planning opportunity at virtual shows. Most of the shows we have been at have an attendee list icon. Check the attendee list during the show to see who is there. Check the attendee list periodically during the show as it changes during the event as people drop in (and drop out). As you see people log into the show, match them to your intelligence plan and reach out to them. This is the virtual event version of bumping into people.
- One final bumping into people tip: Many of the shows we have been at have networking lounges. Anyone in this lounge should want to talk. Go there periodically and see who is there.
- Profiling who you want to interview is important, but there is a VTSI opportunity: you can profile targets while at the event. You really could not do this at a face to face show and if you bumped into someone (very normal), you could not Google their name while talking to them! But, at the virtual show, there is a lot you can do in the background. For VTSI, you can do this research on the fly: you can check their profile (event), LinkedIn profile (if it is attached), internet presence, tweets, etc. You can even check in real time with your friendlies and get a warm introduction, all without the target seeing your eyeballs moving. You can be ready. This research can even continue when you are chatting in the text box.
- Profiling in video mode. If you are talking to them via video, focus on everything that is in front of you and around them. What pictures are behind them, what is on the wall, on the desk? Many people are very deliberate about what they show you. Maybe you will see unplanned events like children entering the screen or hearing other people or animals. Ask questions about what you see and hear. All of this provides an opportunity to get insight into personal space and may allow you to draw a connection faster.
- In TSI, we suggest that you talk to people who have been at the event in the past to help in planning. For VTSI, talking to participants from the past events (if it was held in person) is still valuable to get insights on what to expect. Further, talk to people who have used the platform for tips on how to effectively use it for VTSI. Find out how you communicate with people, the tools for saving information, how to get to the various locations such as the trade show floor.

## Administrative Planning

- TSI has the team getting together in a war room or elsewhere during the event for debriefs and planning. For VTSI, if you're not in the same room as your team, figure a protocol to communicate with your team. Text messages, slack, teams, etc., make sure you have a way to communicate with your team wherever they may be. Develop an internal communication strategy for real time communication during the event.
- Similar to TSI, you need to make time for daily debriefs with your team. In VTSI, you also need to add to the list of debrief items VTSI items, such as the need to change how you look, including your digital footprint, or even, perhaps, the look of your digital booth. Much like any intelligence exercise, we want to make these changes based on information we are getting from multiple inputs: corroborate and adjust where necessary.
- Similar to TSI, have a plan to assess your virtual event performance and learn for your next virtual event. This is likely even more important in VTSI, given how new most people are to it. In fact, given its newness plan to assess performance each night of the event and come up with new tips for the next day. Remember, unlike TSI, you won't have everyone around the table at the end of the event for this discussion, so figure a way to make this happen virtually.

### The Resource Plan

- A big difference between VTSI and TSI is the ability to draw on resources. TSI focuses a lot on finding friendlies that will be at the event and being very judicious in who you bring from your organization, given the cost of attending. Bottom line, virtual trade shows don't have travel costs. We were at one event where the booth had 27 people staffing it and these people were from all over the world and various areas of the company. VTSI is a great opportunity to put into place the open intelligence process, bringing in people from throughout the organization to help with your event intelligence activities.

### Technical tips

- Get comfortable with the platform technology: How do I share my screen? How do I make you the host? How do I open the platform? How do I invite someone? How do I invite someone if I'm already on the platform? What else can I do on the platform? Can I share files? Can I chat? Can I chat with specific people in the call only? What other technology tools will I need (e.g. moving the target to my Zoom or Teams room). If you can, log onto the event platform before the event starts. Some events allow you in up to a week before the event to look around, others have early morning looks the day of the event. To get to know the platform, see if there are training materials provided by the conference/trade show organization. If not, check the platform supplier, see if there are videos of the platform in use, talk to people who have used the platform before. We did this for a recent virtual event.
- Think about getting familiar with multiple social media platforms and multiple trade show platforms so that they become second nature: practice, practice, practices. For one virtual trade show we attended, there were no available training materials but we went to a trade show a month earlier that used the same platform used for the trade show we were going to attend. At that show, we practiced talking to each other and when we "saw" friendlies at the show we talked to them. We tested all of the system's functions.
- If the technology challenges you or you are not sure how to communicate with emojis, get someone to teach you.

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## Gathering Information at Virtual Events – Networking & Interviewing

Events are great places for collecting information and many of TSI tips are around interviewing. It's about making a good first impression and creating trust and comfort with the person from whom you want to gather information. You want the person you want to interview to see you as someone with whom they would like to connect. SCIP materials have had many tips for making a good impression, as well as creating trust and comfort with the person you want to interview, including:

- Do research on the person you want to interview (profiling) to figure out how to best connect with them
- Find commonality between you and the target such as a common friend
- Mirror their body language
- Dress appropriately
- If possible, assign a friendly who can connect with the target
- Use the interview to create a relationship with the target rather than just going for information

All of these TSI tips apply to VTSI, but there are some virtual event twists. How do you do this when your first interaction is typically via text in a chat window? What do you do when you can't hang around and observe patterns of interaction? What does bumping into someone look like at a virtual event? How do you create a good first impression in a virtual environment? First, similar to TSI, in VTSI, you should profile the target as you ordinarily would. Add to the "normal" profile additional information such as how the target likes to communicate. Is it text chat? Is it visual? Regardless since you will likely be starting with text chat what "words" do they like or dislike? Do they use emoji's (these can be great for connecting)?

es, dress and look the part is still important, although once again, you likely are starting out in a text chat mode. How do you make a good first impression in this virtual world? Similar to TSI, having a common interest or connection will help and a warm introduction from a common friend is important. However, while in the TSI world the impression will also be formed based on what you “look like” (body language, clothes, words, tone), we have noted that in the virtual world the first impression will be based more by your opening text chat lines and your digital look and presence.

### **Digital Image**

It's likely that the target will quickly click on your LinkedIn profile, your conference profile or whatever else the event puts next to your name. They may even go further and check out other elements of your digital footprint. This means you need to think about your online profile as being part of your VTSI networking strategy. Solid messaging, consistent and inviting social media profiles and posts, and other mechanisms are important. A “no image” LinkedIn profile that has “BD Manager” only is not an inviting one. Bottom line: you want your online profile and digital footprint be the kind that appeals to the people with whom you want to network with. You want to “look” digitally like someone they would want to network/talk too. Think about changing your profile to match the event you are going to as well. We had one of our company executives change her background picture in her LinkedIn profile for one event. Finally, consider having a few of your friendlies check your online profile/digital footprint to ensure its appropriateness for your targets. Ask them, “What type of message does my online footprint give you?” Adjust if necessary to meet your goals or assign a friendly to do the interview/reach out.

### **When Using Chat - Opening Lines & Interview Tips**

- Opening lines count (just in TSI): the difference with VTSI is, if it is via text in a chat box. Think about having some solid opening lines that you can quickly put in the chat box. Make sure your text messages create a positive impression. Have a few opening lines ready to put in the chat box and ask your friendlies to assess these lines. Think about having opening lines ready for each of the people you are hoping to interview that have been developed based on your profile of the target.
- Develop your communication cheat sheet with answers to anticipated questions as well. Like any trade show, it is important to feel prepared for any question that might come at you. In virtual settings, it might be even more critical as you do not want to take a long time typing in your response. By preparing answers ahead of time, you avoid the need to search for answers. Speed matters and having prepared responses will help.
- Be selective of words if using text. Be strategic and tailored. It is not likely that the target will read a half page of text.

### **When Using Video – Opening Lines & Interview Tips**

- If communication is going to be through video, practice with a friendly who would have insight on the person/people you will interview. Get feedback from your friendlies about how you come across via video.
- Make a good impression using (rather than in spite of) the technology). Lighting, webcam placement, virtual background, sound/microphone, background are all to be considered. Have a virtual background that would appeal to the person you intend to interview. Your profile of the target may even lead you to change your background to something that is more appealing to them. When we did the event intelligence program with the Defense industry companies, one of this article's authors put themselves “virtually” into the cockpit of a military jet. It made the participants more relaxed. Perry's research into psychology, biology and neurology really drove a lot of tips involving relaxing targets by creating a more target appropriate background.

### Other Interviewing Tips

- You do not have to worry about being nervous when you are in chat mode: the person being interviewed cannot see you. Further, as this is relatively new, most people are relatively relaxed about being contacted at an event through the chat box. Not everyone says, “Yes, let’s chat”, but many do. This may be a function of the newness of the virtual events or people being genuinely friendlier now (we have noted this during Covid-19), or even lonely during Covid-19. Regardless of the reason, for now it is easier to reach out at these events.
- Get a mutual friendly to introduce you to the target. This is important in TSI but even more important in VTSI. Depending on the virtual event platform capabilities you may even be able to start the conversation as a three way text chat with the friendly doing the introduction there.
- Use the communication method that is appropriate for the target. If they are an introvert, keep them in text mode. If they are an extrovert, move them as quickly as you can to video mode. They may even prefer to move the conversation to the telephone (many of us are tired of video). We’ve also found it a powerful tool to give the option: “I’m happy chatting in text, and here’s my video link/audio number if you’d prefer telephone .....”.
- TSI has you focused on the target and not getting distracted. The same applies for VTSI, but there are some technological factors that can interfere with focus and gives the target the impression that you don’t care about what they have to say. Turn off your email and other notifications and close all non-essential programs. These are all the things that cause your eyeballs to move away from the person you are interviewing, to look distracted. There is even new research from the University of Texas at San Antonio and the University of Oklahoma that demonstrates how your shoulders can give away (93% of cases) that you are typing. Bottom line: do not get distracted on your email or cell phone, and no multitasking.
- Another technological tip/pointer is that there can be problems with internet lags and the internet signal itself. Think about using an Ethernet cord for a more stable signal and have a backup internet plan in case your network goes down. If you are at home, note what else is happening around you: if you have many devices connected to the internet simultaneously (think the kids and school, gaming, heavy data use), this could influence how you look and your ability to interact. At one recent event, one of this article’s authors told their nephew to stay away from playing online games while the event was on.

A few last technology related tips to maximize making a good virtual impression, especially when interviewing:

- Turn off your mic when others are speaking and of course remember to turn it on when you are speaking.
- Make sure when you hang up on the video chat that it is fully hung up.
- Be fully clothed (this was never a problem in TSI).
- Ninety percent of meaning is through non-verbal (tone and body language), so don’t jump to conclusions based on the text box message. However recognize that who you are talking to likely will. When in text chat mode, if you have to wait for a response from the target or if the response seems a little more jarring than normal, don’t make bad assumptions. Of course, that also reinforces the need to have someone check your text messages to ensure that your message will not be misinterpreted. Clarity in communication is your friend.
- In many of the virtual shows we have been at, if you are logged into the conference site, it notes you as being there, unless you change your conference status to being busy or out. If you are listed as being there, be ready to communicate. I was at one event where I messaged someone and three hours later they responded, and they apologized as they had stepped away from their computer for the afternoon. This is important because if people think you are there and reach out to you, they will not be happy if you do not respond. This was never a problem at face to face shows. If someone saw us there and said, “Hello”, we really were there!

## Conclusion

Virtual trade shows are new to many of us and many in the CI field are trying to adapt to this new world. This article provides readers with dozens of tips based on the three authors' recent experiences in navigating many, many virtual events. Combine this with the SCIP Webinar, "Using the Event Intelligence Toolkit to Maximize Your ROI from Virtual Conferences" and the Competitive Intelligence Magazine article, "Event Intelligence During Covid-19: Top 6 tips" and you have a valuable start to developing your Virtual Trade Show Intelligence (VTSI) toolkit. But, we want to see this VTSI toolkit grow. For this to happen, we ask that you, the readers share your tips with the CI community. Email us your tips and we will add it to what we hope is a growing list that will be shared with the community. Let's share experiences and tips and make VTSI as successful for the CI practitioner as TSI. One final tip – BE ETHICAL in everything you do in VTSI.

## AUTHOR BIOS

**Dr. Jonathan Calof** is recognized as one of the leaders in intelligence and foresight. A full professor of International Business and Strategy at the Telfer School of Management at the University of Ottawa, Dr. Calof combines research and consulting in competitive intelligence, technical foresight and business analytics to help organizations develop key insights on their competitive environment. Jonathan received the fellows 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, foresight and analytics and has helped several companies and government agencies around the world enhance their capabilities on these areas. He can be reached at [calof@telfer.uottawa.ca](mailto:calof@telfer.uottawa.ca)

**Jonathan Dunnett** has been an active practitioner and advocate for competitive intelligence since 2008. Jonathan's work has exposed him to a significant depth and breadth of industries, including technology, manufacturing, legal and more. With hundreds of engagements under his belt, he has been fortunate to work with firms of all sizes, ranging from startups to SMEs/SMBs to top global firms. In his current role with Venn Innovation, he works with innovative startups and SMEs across Atlantic Canada to help them plot their growth through insights and intelligence.

[jonathandunnett@gmail.com](mailto:jonathandunnett@gmail.com) or [jonathan@venninnovation.com](mailto:jonathan@venninnovation.com)

**Perry Steckly** researches and explores human behaviour through a variety of lenses and appreciates all it has to offer – the good, the bad and especially the ugly. He enjoys exploring what we say and do, and the many factors that influence our decisions and actions. An extensive policing and intelligence career fostered his keen interest in people and fueled his consultant company which has captured the interest of the justice, defence, security and intelligence sectors. He has blended his passion of human behavior, profiling, intelligence and training into a variety of services and programs. Perry spends time with fascinating, dedicated professionals working on Integral and meaningful projects. Perry can be reached at [humint@bell.net](mailto:humint@bell.net)

## **SIDEBAR 1: 10 STEP COMPETITIVE INTELLIGENCE PROCESS**

### ***Collection plans:***

1. Kits and information needs
2. Identify the sources for the information
3. Relate your plan to the show

### ***Logistical plans:***

4. Develop your resource plan
5. Start working with your resources pre-show
6. Other pre show logistics
7. Set up the war room
8. The night before preparation and logistics plan
9. Collecting at events

### ***Security plans:***

10. Protecting physical and intellectual assets