Gaining Market Insight from Events:
A Lifetime Journey

Jonathan Calof

Strategic and Competitive Intelligence Professionals (SCIP)

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SCIP is the world's largest non-profit community of leaders who leverage insights and best practices to enable smart strategic choices and transformational growth. We increase members' impact and capabilities by advancing ethical best practices, providing training and education in critical skills, developing professional standards, curating innovative and disruptive ideas, and cultivating a powerful community. As a non-profit, we collaborate with partner organizations to promote the value of strategic choices driven by insights rather than by gut feel, conventional wisdom, or the loudest voice in the room.

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Forewords

As competitive intelligence professionals, our job is to help our organizations ethically exploit growth opportunities, and to minimize strategic risk and surprise. We do that with a mix of **inputs** (e.g. HUMINT, large secondary data sets), **throughputs** (e.g. strategic frameworks, data models), and **outputs** (e.g. competitor profiles) that are used to drive strategic outcomes.

Technology, not surprisingly, has had an accelerating impact on these inputs, throughputs, and outputs, requiring every serious CI professional to do some soul-searching about what needs to be kept, updated, and eliminated.

Which begs the question: in our digitally enabled world, where our refrigerators know to automatically reorder milk to be delivered straight to our doorstep, why are we publishing a book about trade shows? Aren't they on the "to be eliminated" pile?

Quite to the contrary. Rumors of the death of trade shows has been greatly exaggerated. Even as some "legacy" shows have shrunk or disappeared, many companies are increasing their investment in trade shows to connect with customers, suppliers, and channel partners. They're investing heavily in technology (e.g. we finally have booths with holograms!), personalization, and pre- and post-show experiential elements. Given that product lifecycles are dramatically shortening for most industries, it's not surprising that trade shows are playing an ever more important role in showcasing the latest innovations and driving sales.

Add it all together and what do you get? New technologies, customers ready to open their wallets, and hundreds of sales reps under one roof; in other words, a gold mine for intelligence gathering.

In today's age, however, gathering information without a clear plan on how to use it to achieve an outcome is sheer madness. Enter this book, by Professor Jonathan Calof. Throughout his career as an academic, researcher, and consultant, Jonathan has made enormous contributions to the theory and practice of CI. Jonathan is uniquely suited to bridge the practitioner and academic communities to bring us a volume dedicated to the inputs, outputs, and throughputs we must master for our event intelligence programs to deliver the best outcomes.

Whatever title is on your business card, this collection of articles will provide practical insights and recommendations, grounded in research and a lifetime of experience. As the leading non-profit serving the community of competitive intelligence professionals, SCIP is grateful to Jonathan for his generosity in sharing his event intelligence journey with our member community.

Cam Mackey

Executive Director
SCIP

With today's perpetual disruption and hyper-scale levels of data all around us, the challenges of garnering useful knowledge in a timely manner remain increasingly challenging. Coupled with the future "normalization" of incorporating many aspects of industry within a virtual business platform, these challenges are not only unique, but are essentially uncharted areas of exploration.

I've always felt that the concentration of knowledge experts within a specific discipline garners the most significant "content-rich" environment for insights acquisition. Event activities, both in their physical and virtual format, are extremely concentrated areas of information that, when tapped appropriately, can yield great levels of insight unavailable from most of the common primary and secondary sources available.

This opportunity has been captured in this book; the ability to gather significant intelligence that can be brought back to one's organization and effectively be a value contributor to the overall industry intelligence assessment process. When acquired and managed via the parameters outlined herein, the intelligence practitioner can readily incorporate into their analytics to better equip their strategy with the right details.

The significant challenges brought on by huge disruptive activities make it even more essential to utilize every source of content available to maximize the appropriate signals and decipher value-rich content from the noise. An Events-Inclusion Intelligence Strategy is right in line for understanding the nature of industry disruption and its implications, while also formulating the right recipe for strategy development.

The content provided herein will equip the Intelligence Professional with a straightforward, process-driven methodology to extract valuable data content from event activities – both in a physical and virtual format. Having this weapon in the Intelligence Professional's arsenal is a key differentiator in the value contribution towards real business growth.

Paul Santilli

Hewlett Packard Enterprise
WW OEM Industry Intelligence & Strategy
SCIP
Chairman, Board of Directors

Testimonials

'***Gaining Market Insights from Events – A Lifetime Journey*** is a key resource to understand the enormous potential of event intelligence, not only as a source of valuable insight about the market but of your organization's complete operating environment. Event intelligence is for all kinds of organizations, and it is important to recognize that many people and many types of intelligence and insights can come from events. Jonathan demonstrates that event intelligence doesn't need to be limited to big trade shows and can even be used to address public affairs challenges. This resource has provided me with an understanding of how to plan for and structure the gathering of non-market intelligence from governments, lobbyists, and interest groups.

The examples of tools and techniques to help you become organized so that you can take advantage of the trade show intelligence opportunities outlined in this book will be invaluable to information professionals who collect, organize, and analyze information to aid in decision making.' **Jim Miller, Principal, Connect Public Affairs**, **Director, Special Libraries Association**

'Trade shows and conferences bring together the best mind of an industry and are a ripe opportunity for doing competitive intelligence. No one explains 'trade show intelligence" better, easier or with more experience than Jonathan Calof. If you want to get the most out of your trade show experience, this is the book for you.' **Zena Applebaum, CI Fellow, Thomson Reuters**

'Jonathan Calof is the personification of best-in-class trade show intelligence, allowing both novices and pros to understand and benchmark their activities in this HUMINT rich environment. For those unfamiliar with trade shows, Jonathan has eloquently shared his blueprint for success and given you a virtual tour to convince any business leader of their importance.' **Andrew Beurschgens Senior Manager, Market Intelligence BT Insight | Strategy & Transformation**

'Trade show intelligence is essential for every company to acquire and maintain a competitive advantage. Unfortunately, this subject is not getting enough attention. The experience that Professor Jonathan Calof obtained in recent years, and his continuous achievements put him in a prime position to advise marketing executives together with competitive intelligence directors for whom this issue has to be high on their list of priorities.' **Dr. Avner Barnea, (Ph.D.) Brig. General, ISA (Ret.), Netanya Academic College, Israel Chairman: FIMAT (The Israeli Competitive Intelligence Forum)**

'One of the most overlooked sources of unique Competitive and Market Intelligence insights is the trade show. Getting the most out of a show requires a mindset change from that of a trade show tourist wandering from booth to booth and session hopping to find something interesting to that of a Trade Show Pro who has planned out their entire event to maximize collection opportunities. Jonathan is clearly a Trade Show Pro who knows the process from the exhibitor, attendee, and CI/MI collector perspective. His background allows him to look at the trade show from multiple angles and offer up useful insights to all trade show participants.' **Erik Glitman**, **CEO**, **Fletcher/CSI, Inc.**

’Trade show intelligence collection is the best time investment of any collection tool. I don't know of any other venue where you can meet and learn from your customers, competitors’ customers, competitors, industry experts, those in your supply chain, and friendlies, as Calof terms those who will cooperate with your endeavor to collect. People are there to market their products and services. They are there to sell and that means they have to share.

Remember: Trade show collection isn’t just targeted at the competition. It’s great for uncovering market trends, innovation and so much more, if you use elicitation skills to draw this out of those you meet, whether formally or informally. TSI’s competitive advantage is that you can collect a tremendous amount of intelligence in just a few days, even more if you are working with a team! Don’t forget the cocktail parties, but let your targets do the drinking! Learn the tricks from the expert, Jonathan Calof, who’s conducted, taught and written about TSI for 40 years.’ **Ellen Naylor, Founder, The Business Intelligence Source**

’The depth and breadth of Dr. Jonathan Calof’s expertise in trade shows (both in-person and virtual) have been a tremendous asset to clients in our work together and are certainly represented in this book. With insightful approaches, tactics and frameworks, and evidence-based cases to demonstrate the value of this domain, those that read the book are sure to benefit. Resources like this will have a long-standing impact on the future of the business and intelligence landscape.’ **Jonathan Dunnett, Program Manager - Market Insights and Analysis, Venn Innovation**

Introduction

My career in trade shows kicked off when I was a pre-teen. At the tender age of 12, my late Uncle Abe had me staffing a booth with him at a provincial show in Saskatchewan. At 16, I was hired by the Canadian Government Exhibition Center (the part of the Canadian government that was responsible for trade shows) to build booths for companies and government agencies taking part in big trade shows. A few years later, I started doing the project management for exhibitors and accompanying companies to trade shows. Besides being in a booth at the age of 12 for my uncle, I have over the years staffed a few booths, a little more professionally, where I have had the opportunity of selling products and services and providing information to potential customers and others.

Through all of this, I came to recognize the enormous potential of trade shows as a source of information about the market, and especially market opportunities. I also saw how many organizations wasted these opportunities!!

Many years later (today), I no longer build booths or manage companies' presence at trade shows. Now I help governments, companies, associations and others maximize the opportunities at these shows, both inside and outside the booth, through the use of my trade show intelligence toolkit and (because of Covid-19) my virtual trade show intelligence toolkit. By bringing organizations to trade shows and through my trade show intelligence training program, I have seen how these events, when properly managed, can help organizations refine their innovation strategy, find sales opportunities, joint venture partners, financing, and much more.

In short, I have discovered that trade shows are not only a great place to gain exposure in a traditional sense (why organizations have a booth in the first place) but also a great vehicle for developing the insights needed to win in the marketplace. The use of the event intelligence toolkit (which will be outlined in this book) has had a major impact on organizations' trade show ROIs:

> "***The trade show intelligence program really opened my eyes to how much opportunity we were leaving on the table… (Using the trade show toolkit) our response rate from potential customers went from 1% or 2% to over 70% at the show… In the previous year I walked away with two opportunities; this past trade show I walked away with over 20."*** **(Clear Risk)**

I have seen how the process has helped companies of all sizes, governments and even associations improve their ability to gather valuable market information at events:

> ***"The process assisted our companies and the association itself in acquiring more reliable information in less time. It is something that we will use again and recommend to our members."*** **(BioAlberta)**

I have seen how, by following ethically based competitive intelligence approaches (which you will learn about in this book), you can gather more useful information at a major trade show than you would otherwise be able to gather in an entire year!!

Since the 1990s, the competitive intelligence (CI) community has raved about the intelligence opportunities emanating from trade shows. Here are a few quotes from luminaries in the field:

"Conferences furnish the greatest potential for collecting intelligence in the shortest span of time, for the least amount of money… Many formal and informal activities take place at conferences that can furnish a plethora of collection opportunities… Too few people approach these situations as collection opportunities, especially in a systematic, proactive way." **(From Shaker and Kardulius)**

"Properly organized, a competent, well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances." **(From Prior)**

"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 have made the most of trade events as a primary collection opportunity." **(From Goldberg and Barak)**

Why is the intelligence opportunity so big? Why do conferences, trade shows and other events represent such great opportunities for developing market insights? Here are the top three reasons:

1. Everyone is in one place: suppliers, customers, competitors, government – essentially your entire value chain.

2. Most want to talk. It is called trade "show", not trade "protect". Even virtual trade shows have built-in networking opportunities.

3. Early warning is all over the place. In fact, most of the shows I go to have innovation sessions and panels that look at where the industry is going.

Yet to develop the kind of market insights that I have mentioned in this introduction – whether they relate to customers' needs, competitors' intentions, innovation, technology, partners, government directives, and so forth – you need to be properly organized.

This book, ***Gaining Market Insights from Events – A Lifetime Journey***, provides you with the information you need to become properly organized and to develop a trade show intelligence toolkit. The book is divided into five sections, with each section offering tips and tricks to help you maximize trade show intelligence opportunities:

- Section 1: Examples of Event Intelligence
- Section 2: Skills and Techniques for Event Intelligence
- Section 3: How Things Have Changed in Event Intelligence
- Section 4: Special Topics
- Section 5: Getting Ready for Your Event Intelligence Future.

Underlying these five sections are several key themes or lessons:

1. **You must be properly organized.** Each section in this book provides examples of tools and techniques to help you become organized so that you can take advantage of trade show intelligence opportunities. This book presents you with planning templates, checklists and many tips on how to organize effectively in order to leverage trade show intelligence.

2. **It is really event intelligence, not trade show intelligence.** There are many more places, besides trade shows, where you can use the techniques. In the pages that follow, you will read about how the techniques have been successfully used at conferences, workshops, office parties, sporting and other events. Basically, anywhere that people get together is an opportunity to gather information. For the rest of this book, I will no longer use the term "trade show intelligence", but rather "event intelligence". The techniques described in this book can be applied anywhere that people gather. Furthermore, as I have learned (and experienced) during Covid-19, the techniques work at both in-person shows and virtual ones.

3. **Event intelligence is for all kinds of organizations.** Yes, large firms make regular use of event intelligence and you will find examples of this in this book. However, the book also contains many examples of small and medium-sized companies, governments, associations, non-governmental organizations (NGOs) and universities successfully using event intelligence to gain valuable market insights. The wide range of organizations and industries that have successfully run event intelligence programs is indeed impressive and it is my hope that every reader will find examples in the pages of this book that their own organization can relate to. Event intelligence is for everyone.

4. **Event intelligence is about working with others.** Much of the value of event intelligence that you will read about in this book stems from the fact that the intelligence process includes people from outside the competitive intelligence unit. Greg Richards, Paul Santilli and I coined the term "open intelligence", which refers to people from within as well as outside an organization being invited to help formulate intelligence plans, gather information, assess that information and engage in efforts to communicate the information. Intelligence, we have found, is better when it is "collective intelligence".

   Many of the articles that follow describe how the event intelligence team included company personnel from outside the intelligence function (that is, marketing & sales, research & development, human resources), customers, government officers, association employees and even competitors. At one event that I attended, there was me (the consultant) and three members of the organization (they did not have a CI unit). As the event unfolded, other people whom we knew offered to help us, and by the end of the event we counted over 100 "friendlies" (as I call them) who had gathered information for us. This is collective intelligence at its best.

5. **Event intelligence covers many interesting areas/topics.** When I first became involved with CI and SCIP (Strategic and Competitive Intelligence Professionals) in the early 1990s, the focus of CI was on competitors and what they were up to. While competitor-based intelligence clearly has value and can be harvested at events, the articles in this book bear witness to many other topics that have been successfully explored at events. For example, I have seen the event intelligence process used to help organizations' innovation programs, to learn about

customer needs, to understand the customer journey, to enhance sales performance, to assist with new product development, to find partners, and much more. I have also seen associations and government officials use trade shows to develop better programs.

You will read plenty of stories about how event intelligence has been used in all these areas and has helped organizations meet their booth (not just intelligence) objectives as well.

6. **Event intelligence is forever changing; therefore, keep learning.** Perhaps what I have enjoyed most about my 40+ years in event intelligence is that things are constantly changing. Fortunately, I like to learn. As CI develops and technology marches on, we learn about new tools and concepts that can be applied to improve our event intelligence activities. Covid-19, for example, has brought about enormous change, which has forced me to learn how to adapt event intelligence techniques to the new reality.

Below are descriptions of the five sections in the book, as well as a few insights and tips from each section.

Section 1 (Examples of Event Intelligence)

The five articles in this section provide you with many examples, drawn from several industries, illustrating how event intelligence was successfully used to help organizations gain market insights that helped them make important decisions. Each article contains detailed information on the intelligence topics formulated and how the event in question was leveraged to gather the information for each topic and, in many cases, produce the relevant results. Each article also provides a wealth of tips that provide a useful starting point for the event intelligence toolkit.

Section 2 (Skills and Techniques for Event Intelligence)

This section comprises 12 articles spanning the full breadth of core skills required to maximize the event intelligence opportunity. The section starts with an event intelligence quiz which will enable you to assess how organized you are to meet the event intelligence challenge. Think of it as an event intelligence skills, tools and techniques checklist. The article is followed by a column based on a trade show webinar offered by SCIP several years ago, in which many leading CI experts offered advice on what was required for event intelligence success. Section Two provides valuable tips on:

- the importance of ethics when engaging in event intelligence activities;
- how to develop event intelligence plans;
- how to collect information at events and how to make sense of that information;
- how to effectively communicate to headquarters from the event;
- how to evaluate trade show return on investment/performance;
- how to protect your organization’s valuable information when at a trade show (trade show counterintelligence).

As event intelligence is a true collective intelligence opportunity, the section ends with the article, “Working with ‘Friendlies’ at Trade Shows”, which gives you a framework that you can use to expand your intelligence reach (not just your event intelligence reach).

Section 3 (How Things Have Changed in Event Intelligence)

The 10 articles in this section explore two of the bigger changes that I have seen in the intelligence domain, which affect event intelligence: the broadening of the scope of competitive intelligence and the development of intelligence technology tools.

When I started with the column in 2003, CI was primarily focused on understanding competitors. Erik Glitman runs an excellent webinar on event intelligence that SCIP members can view for free. In it he points out that the #1 objective of CI teams at trade shows is to learn about competitors. In 2015, Nan Bulger (who at that time was SCIP's executive director) developed a concept she termed "integrated intelligence". In describing this concept, Nan explained how CI has evolved:

> ***"It's really evolved into understanding not just competitors, but really putting the customer at the center of the intelligence you collect, so you can determine how best to help your customers compete in the market and help your customers make money and, looking at how there's a competitive effect from the competitors, how the political environment affects decisions that customers make, how the market dynamics affect the customer, and so forth."***

This broadening of CI beyond just competitors was something that I had also been witnessing in my own event intelligence applications. While understanding what the competitors were up to was a critical part of many of my clients' event intelligence plans, so too was the opportunity to gain customer intelligence from trade shows, to learn about customers' true needs. Event intelligence was seen as something that could help organizations understand and "fix" the customer journey, while also helping organizations with their innovation efforts.

A second broadening of the scope of intelligence came with the introduction of the term "open intelligence", which Paul Santilli (who was on the SCIP board of directors), Greg Richards (a leading processor in business analytics) and I coined in 2017. Open intelligence built on the growing open innovation concept by proposing that innovation (or, in our case, intelligence) needed to be more open – in other words, it needed to draw on people outside the CI unit in other parts of the organization, as well as people in the external environment to help with event intelligence. This extended beyond simply asking friendlies to help collect intelligence; it included friendlies and other experts participating in formulating intelligence topics and plans, assisting with collection and analysis, and even getting involved in communication. Here is an example:

In my event intelligence training programs, I ask participants to present their intended event intelligence topic/focus to the group. In one of the sessions I noticed that a few of the participants had (let's call it) negative body language when one of the companies was presenting their intelligence focus for the next trade show they were going to. I asked two of the participants who were exhibiting negative body language to explain why they were negative. The first "negative" said "I know that company well, I am the executive director of their association. This company needs to focus on innovation as their products are falling behind others that I am seeing". The second "negative" said "I am one of their customers and I hope they learn at the show how to be more responsive to their customers. They need more agility".

Your suppliers, industry association executives, government partners, customers and even competitors have insights into what you need to know and do. Why not consult them? Section three, therefore offers ideas on how to grow and expand an event intelligence program in light of the broadening of the scope of competitive intelligence. The second broad set of changes I have seen is in the area of intelligence technology, which can be used to assist event intelligence efforts. In 2003, the technology I used consisted of Motorola walkie-talkies for communicating at the event, information forms for filling in the gathered data and an Excel file for inputting.

Collection was largely done via interviews, observation and, of course, reading. Since then, technological advances have included the growth of social networking and the ability to mine information from Twitter and other social media networks at events, as well as the development of technology tools, such as Slack and Discourse, which are used at events to share information and communicate with the event intelligence team. Even the analytical side of event intelligence has benefited from technology. For example, business analytics is now used to make sense of information gathered at events in real time. Section Three also has several articles with tips on how to use these technologies to support intelligence efforts.

Section 4 (Special Topics)

This section brings together 14 articles developed to help broaden your understanding of event intelligence and its application. I subtitled this section “What I Have Learned?” as it reflects my observations (or, should I say, my “aha moments”) since 2003.

The section starts with three articles that illustrate why you would want to use event intelligence techniques at more than just trade shows. “Tis the Season to do CI” recounts stories of how I have successfully used event intelligence at office parties and other social events. “Being Ready for a Scientific Conference” shows you how valuable event intelligence proved to be at a foresight conference. “Party Till You Learn” summarizes how the tips forming the basis of Section Two of this book (the skills and techniques for event intelligence) apply to various social, non-trade show events. When I was introduced to the field in 2003, I thought that it just catered for big trade shows but, as revealed in the three articles, the event intelligence toolkit can and should be applied anywhere that people gather.

The next section in Special Topics has three articles that look at who should be part of an intelligence team. In 2003, the idea was that CI personnel (in most cases, just one person) constituted the event intelligence team. Over the years, I have seen the value of bringing in other employees from within the organization and even external parties, as well as different skills, different networks and – very importantly, depending on the type of intelligence needed – subject matter experts. At a recent CI conference (the Institute for Competitive Intelligence’s 2020 International Competitive and Market Intelligence Conference), one of the speakers remarked that due to the growing complexity of her company in terms of product lines and technology, she was now more of a CI coach and integrator, drawing in people from across the company and helping them develop intelligence. These articles provide case examples and tips that will help you identify what people and what skills are needed to bring to an event.

Perhaps the most important part of this section is my observations about using CI to help an organization realize its event objectives. In 2003, the thinking was that trade shows were great places for intelligence teams to gather the information they needed for their intelligence programs. But as I have learned over the years, there is much value in using the event intelligence toolkit to help the marketing department get more value out of trade shows, to do better at the booth and to help employees who are attending an event to get more out of it. In this respect, this book is not just for intelligence professionals; it is for anyone who goes to events.

Many years ago, I teamed up with Barry Siskind, one of the top trade show experts in the world and author of *Powerful Exhibit Marketing: The Complete Guide to Successful Trade Shows, Conferences, and Consumer Shows*, in a seminar called “Inside and Outside the Booth”. He spent half the day teaching participants about boothmanship and I spent half the day teaching them about event intelligence. We teamed up because we realized that CI can be used to help a company realize its event objectives. CI can help train booth personnel in how to interview and profile potential customers, encourage a better understanding of customers’ true needs at the booth, identify emerging technologies and other trends, and so forth. The idea is to have event intelligence embedded in an organization’s overall event program and not have it simply form part of a separate intelligence program run in parallel to the event.

The inspiration for the next two articles in the section (“Conference and Trade Show Planning Committees as an Intelligence Resource” and “Home Field Advantage at a Trade Show: A Sure-Fire Way for Developing Customer Insights Outside a Trade Show Venue”) came from my observations about how (let’s call it) trade show logistics can play a role in an intelligence program. This includes how being on the planning committee of an event allows you to invite special speakers and gives you special access to events and people (although this all has to be done in an ethical manner) and how having the trade show in a city where your organization has a facility enables you to invite customers and potential customers to your facility where you can learn more about their needs – which is like running a mini event at your facility.

The Special Topics section also contains an article that looks at the international side of events. I have attended events in Europe, North America, South America, Asia, Africa and Oceania. After visiting 128 countries to date, I can tell you that what works in one country does not necessarily work in another country, at least not in the same way. Culture plays a role, as do various logistical factors. These are outlined in the article, “Conference and Trade Show Intelligence Goes International”.

The section ends with two articles focusing on the question that I am asked most frequently by readers and seminar attendees: How do I get resources/more resources for event intelligence? The article, “Dear “C”– Please Give Me Resources for a Trade Show Intelligence Program”, gives you tips on how to approach senior management for event intelligence resources. It outlines what I term “the intelligence pitch” and illustrates how to sell both the intelligence process itself and the proven value of intelligence. This is followed by the trade show pitch, which highlights both the enormous value and ROI that event intelligence brings (it builds on the many articles contained in this book). The article ends with advice on how to use the specific event material (list of booths, presentations, and so on) to show “C” what is at the event and how it can be used from an intelligence perspective to help the organization.

The final article in this section, “Conference and Trade Show Intelligence: Jump-Start Your New Function”, shows how an event intelligence program can be leveraged to start and grow an intelligence function. It is based on my experience that while many organizations are reluctant to invest in intelligence, they are nevertheless interested in investing in ways to get more out of trade shows and other events.

Section 5 (Getting Ready for Your Event Intelligence Future)

This section concludes the book, with three articles intended to get you thinking about the need for ongoing development of event intelligence skills and growing CI’s influence within an organization. “Event Intelligence New Year’s Resolutions” puts the spotlight on next year’s event intelligence activities. The article kicks off with three resolutions and ideas for accomplishing them:

Resolution #1: I will strengthen my event intelligence skills and knowledge.

Resolution #2: I will convince senior management of the importance of event intelligence.

Resolution #3: I will look for ways to help my organization’s trade show team, whether I am going to an event or not.

These resolutions are practical steps along the path towards the development of an annual event intelligence improvement program.

The theme of the second article, “Trade Show Trends”, will hopefully be an important foundation for your event intelligence development. The article is based on a review of what event experts and trade show industry associations say are the trends and changes in trade show booths/participation in a particular year. It also includes my assessment of the intelligence-related implications of such trends and changes. This is linked to Resolution #3 about helping your organization’s trade show team. To be effective in event intelligence, it helps if you understand how to be effective in trade shows in general, which requires knowledge of how event practice is changing. Utilizing the “go-to” trade show idea industry sources, like Exhibitor Online (**www.exhibitoronline.com**), Trade Show News Network (**tsnn.com**), Center for Exhibition Industry Research (**ceir.org**) and Trade Show Executive Magazine (**www.tradeshowexecutive.com**), will help you understand what is going on in the event industry.

Finally, “Event Intelligence During Covid-19: Top Six Tips” is a reminder that while major changes can occur, event intelligence can – with certain adaptations – still go on. This article recounts how, despite the Covid-19 pandemic, event intelligence has been successfully used at various events, including online trade shows and conferences and a virtual international trade mission to Vietnam. For these events, concentrating on friendlies or giving a warm introduction was key, as was being even more focused than usual. Moreover, getting to know the technology platform proved to be critical.

This book, ***Gaining Market Insights from Events – A Lifetime Journey***, is the culmination of what I have learned over the last 40+ years of being involved with events. The material for this book came from my column in *Competitive Intelligence Magazine* (which started in 2003) and various chapters that I have written in SCIP guidebooks. The many tips provided are based on my experience of running dozens upon dozens of event programs and attending trade shows and other events around the world, as well as the experiences of many other CI professionals – my professional friendlies. Where my column is concerned, I have either drawn insights from, or co-authored several columns with, many seasoned CI, business analytics, marketing and academic veterans.

This book is a follow-up to and, in a sense, a much-needed update of "Trade Show, Conference and Event Intelligence Best Practices", which the late Bonnie Hohhof and I put together in 2007. That book and this one are both available, at no cost, to SCIP members. However, while written from a competitive intelligence perspective, this book and the event intelligence toolkit can and should be used by anyone who is planning to go to a conference, a trade show, an exhibition… in fact, any event.

I hope that the information, and particularly the tips, in this book will enable you to help your organization improve its trade show ROI and acquire keen and valuable market insights.

Acknowledgements/Dedication

Gaining Market Insights from Events embodies much of what I have learned about events, from when I was a pre-teen up until today. It is a tribute not to me, but to the many trade show and intelligence practitioners who have shared their stories and knowledge with me, as well as to the hundreds of companies, associations, governments and other entities that have invited me to help them and others develop event intelligence programs.

Writing this book is a way of saying thank you to all those who, over the decades, have enabled and encouraged me to relentlessly pursue my goal of helping organizations become innovative, more competitive and successful by networking and using events. The book also serves as a reminder of the often-overlooked power of events to help you anticipate market changes, discern customer needs, track competitor moves and regulatory changes, and stay several steps ahead in the proverbial race.

My special thanks go to the Strategic and Competitive Intelligence Professionals (SCIP) and, in particular, Cam Mackey and Michelle Winter. SCIP has been by my side, my partner in event intelligence, since the early days.

The late Bonnie Hohhof (SCIP's communications director in the early 2000s) was a friend, an editor, a partner and an advocate for event intelligence in SCIP. She co-edited "Trade Show, Conference and Event Intelligence Best Practices" with me in 2007 and edited my columns for many years, making me look way better than I otherwise would have. Her untimely death was a serious blow to the competitive intelligence community.

Nan Bulger, the former Executive Director of SCIP, supported SCIP's trade show intelligence initiatives, which included numerous webinars, my column, and countless annual and regional conference event intelligence presentations. Her development of the "integrated intelligence" concept was instrumental in moving the field forward. I am indebted to her for her support, her friendship and her creativity in developing new concepts that have helped to give depth and gravitas to event intelligence.

Cam Mackey, till recently Executive Director of SCIP, has been a true partner in this book venture. When I first met him at the CI Fellows AGM, I mentioned the book and his only question was: "How can SCIP help you?" Cam is a true mensch. He supported the book, reviewed all the chapters, offered advice and helped in other ways too. Cam lives and breathes the open intelligence concept, reaching out to many CI and CI-related organizations to see how he can help them. Cam, thank you for all you have done and I look forward to working with you on future projects.

My final and most important SCIP thank you goes to Michelle Winter. Michelle has been a friend for many years and has really become part of my family. Michelle and I share a passiin for hockey, competitive intelligence and Jewish culture. If you saw us together, you would think we were really part of the same family. She is loved by my kids, my wife and my dog. Michelle put in countless hours to help me put this book together. There are enormous technical challenges in bringing a book like this to life, and Michelle conquered all of them – getting ISBN numbers, formatting and unencoding past columns that were security-protected, editing, reviewing and also kibitzing (look that word up if you don't know it).

Thank you as well to Dominic Blakely and my University of New Brunswick (UNB) family. Dominic is my fellow UNESCO Co-chair in anticipatory systems for innovation and new ventures. He is my close friend, my brother, and along with my other UNB brother Dhirendra Shukla my whiskey partner (and hopefully in the near future my golf instructor). Dominic did most of the heavy lifting with the UNESCO proposal as I lay in a hospital bed fighting Leukemia. He encouraged me not to worry about the proposal (or this book). Dominic also did the heavy lifting spending hundreds of hours trying to make the book into an Epub. Dom- you are incredible.

Thank you as well to my University of Ottawa family and in particular the many Deans that have encouraged me to pursue my passion in event intelligence. It is rare for academia to acknowledge the importance of helping practitioners and I am grateful to have had such rare Deans!!!!.

My final thank you, and in fact my dedication for this book, goes to my family: to my late father (Hy Calof) and my mother (Ruth Calof) who always made the commandment, “Honor your mother and father”, a joy and easy to follow; to my sons, Andrew and Michael; to my daughter Jannie (actually my daughter-in-law, but she is really more like a daughter) to Levi , my first grandchild with an infectious laugh and smile that lights up a room – you are such a joy; and to Kayla, my daughter-in-law-to-be who once this book is released I am happy to say will be my daughter-in-law. All of you are so special and have brought much joy into my life. My boys have brought incredible partners into our family and I can’t wait for our future together (this is not a hint for grandchildren).

Thanks also to my faithful companions, Max (my dog) and Bjorn (my grandpuppy), both of whom force me to get away from my computer from time to time and play (neither understands the concept of dad/Zaidy having to work now). You make me appreciate the beauty of a balanced life and bring me a lot of joy.

Finally, and most importantly, this book is dedicated to my wife, Lois. Last year, SCIP interviewed me for a special feature. One of the questions they asked was: “What’s a productivity tip or lifehack that you use often?” My response was:

> ***“At the risk of being accused of being sappy, my lifehack is called ‘Ask Lois’. Those who know me will recognize that Lois is my wife and life partner. She makes my life easy in so many ways, as I am on the road a lot. If you pick your life partner well, it will truly be a lifehack.”***

Lois has been at my side through good times and bad, a giver of the highest order and a helper to so many. During my cancer journey, the medical staff saw everything she was doing to provide support and they said that they wished all cancer caregivers were like her. She gives so much and asks for so little. She epitomizes the dual traits of chessed (kindness) and tsniut (modesty). She is my rock and my better half (and those who know me will quickly attest to the latter).

Jonathan Calof

Section 1:
Examples of Event Intelligence

Trade Show Intelligence: Intensive, Exhaustive and Fun

with Bob Fox

Competitive Intelligence Magazine, November/December 2003

It's a trade show and, as would be expected, collection activity abounds. A look at the floor reveals the following:

- Two government officials work together to gather information; one is from Canada and the other from Switzerland. They are looking at government assistance for companies at trade shows.
- Two other collectors go off to gather information together; one is from government, the other from an association. They are trying to identify what US distributors are looking for in new companies.
- A company executive is off to another booth to gather market information on how foreign companies approach their involvement in trade shows.
- Two consultants working together are combing the floor looking for themes and investigating how products are being branded for the US.
- An association executive is attending a workshop, hoping to learn about new trends.
- Four other people from the same organization are just leaving to go on a tour of local companies, organized as part of the trade show.
- To complete the view, provincial officers, federal government officers, company executives and senior management from two provincial and one national association are fanning out, trying to find out "What's the buzz?"

This is a normal day at a trade show; lots of different people busy gathering information. Closer inspection reveals that all these people are working together as a team, seeking answers to common Key Intelligence Topics. They are actively helping each other complete their plans. These plans come from different companies in different provinces, federal and provincial governments, and associations. There are even consultants there to assist in the gathering of information.

COOPERATIVE INTELLIGENCE

All of them are collecting for a common purpose, bringing the information to a central collator to develop a single database, meeting nightly for information analysis, and receiving a nightly report on the results. They are all participants in an innovative Trade Show Intelligence Mentoring and Training Program. Welcome to Canadian Trade Show 101: Networking and Knowledge Management for Trade Show Intelligence.

In this example, the group banded together to get the most out of a trade show. The association executive was actually gathering for the government, while the government representatives were gathering information for the company! The consultants were gathering for the companies, the associations, and the government. A Swiss government official thought that the entire process was so interesting that he wanted to work with the Canadian official on a joint collection task.

The trade show is the culmination of this unique training program on competitive intelligence (CI) and knowledge management that incorporates training and mentoring with an on-site, in-situ exercise. The program provides a basic introduction to CI and trade show intelligence; then uses knowledge management concepts with teambuilding to get an entire group helping each other conduct trade show intelligence.

This approach allows smaller companies the opportunity to harness the resources of larger companies to conduct trade show intelligence. It helps the governments ensure that seamless delivery that the private sector has demanded for so long. It helps both national and provincial associations link together their interfaces with their members and governments. In a sense, the program is an introduction to CI and a trade show intelligence consulting project all rolled into one.

The Trade Show Intelligence Mentoring and Training Program addresses two key challenges:

1. **Getting companies, associations, and governments to better manage their trade show information activities**

One of the top reasons for trade show attendance is gathering information to better understand markets, customers, and competitors. As SCIP publication articles have mentioned, conferences provide a great opportunity for collecting intelligence in the shortest time span, for the least amount of money.

As Prior pointed out, “Properly organized, a competent and well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances.” Between the speeches, workshops, tours, booths, and delegates, there is an extraordinary amount of information on site.

Furthermore, the trade show is the one place where people truly want to talk about what they are doing. Unfortunately, few organizations approach trade shows with a comprehensive and systematic process to develop useful intelligence.

2. **Developing basic intelligence awareness and skills in ways that participants can relate to and benefit from**

Traditional intelligence programs focus on providing general material to all participants. For government and small business in particular, the complaint has been that material does not translate well to their environment and requires customization. This was described in a previous article by the authors (Calof, Fox, and Nguyen, 2002).

To best describe how this program works to address both needs, this article leads readers through the course process using a recent trade show, the Fancy Food Show in San Francisco, in January of 2003.

FOUR MONTHS BEFORE THE SHOW

The associations, in cooperation with government officers, approach companies and others who would be interested in the trade show intelligence training program and would like to collaborate in joint applications at the show. The show selected is the 2003 Winter Fancy Food Show. Information brochures are created and personal contact is made to discuss the program. The companies approached are those most likely to be interested or involved in this industry.

Commonality is established within the participating group by focusing on one industry. The government and association personnel approached have an agri-food background and mandates related to trade and competitiveness. They also have an interest in working on team efforts to gather and interpret information.

Selection and specific invitations ensure that there will be some commonality among participants. This enhances the prospects of integrating the team to deliver a cohesive application.

THREE MONTHS BEFORE THE SHOW

Interested companies and others are invited to a briefing session on the program. A 90-minute presentation, delivered via video conferencing, outlines what the process is about and establishes the expectations of the team members. The intention is to get participants focused on potential trade show key intelligence topics.

TWO MONTHS BEFORE THE SHOW

The participants attend one day of training. The trainer travels to several locations: Vancouver, Edmonton, Saskatoon, Winnipeg and Ottawa. The training program consists of a half-day introduction to the basics of CI and a half-day on gathering trade show intelligence.

The second half-day has participants begin the process of establishing their own CI plans, complete with Key Intelligence Topics (KITs), Key Intelligence Questions (KIQs) and Key Intelligence Indicators (KIIs). Participants are challenged to think of all the opportunities available to collect information at the trade show. They also need to determine if the information they are seeking can be gathered from another source so as not to waste time at the show.

One participant, when presenting his KITs and KIQs, is surprised to find that several members in the room have the answers to his questions. As a result, he and his company decide that they no longer need to attend the show. This is an example of information sharing at its best and how it can lead to huge savings.

ONE MONTH BEFORE THE SHOW

Now the mentoring phase begins. Participants send their plans to the trainer for comments. They look for potential ways to combine plans and create new teams. The plans include ideas on sources for collection. Participants look at seminar and workshop descriptions, and what companies are listed on the website as already attending the show, and also suggests ideas that would change their indicators or collection plan.

TWO WEEKS BEFORE THE SHOW

This is a kill session. The team gathers to discuss group plans developed in the training session. The idea is to improve on the plans by having the participants rip them apart. What emerge are plans focused on identifying what the team wants to gather and how best to gather it.

At the same time, the participants identify the workshop sessions they will attend at the conference. Sometimes the participants become frustrated because individually they cannot attend all the sessions they need to for their intelligence plan. But they need not worry. Negotiations begin among the group as to who will attend which workshop sessions, and who will visit which booths.

In the end, all agree to help each other collect information. All the workshop sessions are covered, and those attending commit to collect relevant information for the other team members. One workshop attendee may be collecting information for six or seven plans — including for their competitors — and getting information on six or seven sessions in return. The value of the process leads participants to commit to a level of cooperation far beyond what would typically occur.

THE NIGHT BEFORE THE SHOW

At this time, all participants gather for a pre-show briefing. Time is set aside for more training and renewed teambuilding. They now learn about networking, interview techniques, counterintelligence and ethics. The key is to have the right training at the right time, and the night before the show is a good time to talk about how to interview as they begin their collection process.

The briefing also addresses the issue of ethics. The SCIP code of ethics is used: no misrepresentation. Participants ask about gray areas. “What if I overhear a conversation in an elevator that addresses one of my KITs; can I use it?” asks one of the participants. The response from the trainer is: “NO, we are not skulking in corners, hiding behind trees or playing James Bond. If the conversation in the elevator provides information required by your plan, then join in. In this way, you can get more information and context for what they are saying.” People at trade shows and conferences want to talk.

The second part of the evening is devoted to project logistics. Participants learn about the information collection forms that are used to capture the information that is entered into the trade show intelligence database. Schedules are provided for when and where data is collected and when the analysis team meets. Contact cards let the participants know where every member of the team is staying and how they can be reached. Finally, the group reviews each plan, as one more attempt to give feedback and plan for information and task sharing.

DAY 1

10:00 The show begins and collectors are off on their tasks. The trainer spends the first two hours on the show floor identifying areas where plans may have to be modified in light of what is there (for example, exhibitors who did not show up, workshops that were cancelled, and so forth). Here we expect plans to be changed and new KITs and KIQs to emerge.

12:00 The trainer and some of the participants meet for a general discussion on floor progress. The trainer spends time finding participants on the floor and monitoring their progress. A booth collection form needs to be developed that identifies specific information to support two of the major KITs. The trainer prepares this with input from the team and they discuss how to sample the 1,150 booths that are out there on the floor.

13:00 There is more collection activity, with the trainer checking again with team members to review task assignments and check on progress. Occasionally, the trainer accompanies a participant to an interview or works with them to see how they are picking up indicators, and to reinforce course concepts.

17:30 The project collator collects the data forms. Only information that the collectors want shared with the group is entered into the database. Individual companies or groups have specific KITs that may involve confidentiality or be of personal interest only. In many cases, team members request their colleagues to obtain certain information, giving them only partial reasons for why they need it. Having experienced the benefits of teambuilding and seeing the results of the first day of collecting, participants exchange information freely.

20:00 The analyst group meets, reviews the contents of the collection database, and starts processing and analyzing the information collected that day. The analyst group consists of the trainer, the chief collator, and KIT leaders (anyone who is running their own plan). In this particular case, there are also two individuals who are being trained in how to take on the responsibility of quarterbacking in future shows.

By attending the analyst session, participants have an opportunity to learn by observing and doing. Some KITs are put to bed. Others are modified and still others are dropped. The participants see how the plans are evolving, and a few new questions are introduced. Plans are always modified as new information is gathered at the show. It is a very dynamic process. The analyst session ends with plan revisions and collection-related assignments for the next day.

22:00 Time for communication! The trainer and analyst team prepare the report on the day's activities: a two-page summary of the progress on all the KITs and new tasks. Not every participant can attend the analyst session (perhaps due to other commitments), so it is critical that everyone knows where the entire group is at, and the status of each of the KITs, individual work assignments and projects.

This is also the time to inform participants about topics that they need to keep their eyes and ears open for, while on the trade show floor. Participants are urged to send a copy of the newsletter or their own results back to their companies or organizations and determine if any further plan modifications are needed. Also, the plan is sent to their headquarters so that they can gather information that is better obtained away from the show.

DAY 2

This is a repeat of Day 1, with one important addition. The analyst team has a pre-meeting at 6:30 a.m. to ensure that team members validate the findings of the two-page summary developed the night before. It gives those that were at the previous evening's analysts meeting a chance to reconsider their conclusions while allowing those that could not attend to provide input. It also provides an informal setting for participants, particularly those being trained to be the quarterback, to ask questions about the process.

Typical analysis sessions move quickly and involve heated discussions. The late evening sessions do not provide the opportunity to ask questions about the process. Long dinners in San Francisco provide the perfect environment for these broader discussions. The dinners also serve as opportunities to debrief participants on the collection activity and make sure that all information collected has been incorporated into the database.

Food has always been shown to be a great way to build a team and arrive at a stronger group after a relaxed exchange on what is working and what is less clear. That is why we break bread together.

DAY 3

The third day sees additional activity. While the actions of the first two days are repeated, the trainer also uses a new template that the team has designed to address a new KIT. It will allow the team members to review key information on the individual booths. It is tested randomly on 30 of the booths. With the confirmation that the new template provides the critical information needed, the team sends out two groups to survey every fifth booth.

The day comes to an end with everyone exhausted, but exhilarated. Virtually all team members have information for the database and all actively support the process. The team asks the trainer to do some preliminary analysis for the new collection plan associated with booths to determine if more work needs to be done the next day.

THE LAST DAY

It is the last day of the show. The members of a very tired group are assigned their last collection tasks. The trainer follows up with all participants and helps them determine collection priorities for this last day.

But the training is not yet complete. All participants attend a debriefing session at the end of the day. At the session, the trainer assesses the trade booth survey after receiving the information successfully collected from one-fifth of the booths and presents the interim findings from the plans. It is also an opportunity for all participants to provide additional input into the interim conclusions. The debriefing session is attended by all but two of the team members, who are still at the show (the missing two have to tear down their own booth at the end of the show).

Finally, during this session, participants discuss the process. What they liked or did not like, and what changes they would recommend for future shows. The most frequent comments include:

- It was easier to collect information (interview) than I thought.
- It is a good thing that I was focused.
- I liked everyone sharing information and working together – I was able to get more information here than I gathered in previous shows.

The session is scheduled to be 30 minutes, but over an hour goes by before the group decides that they all want to go out for dinner. The adrenalin is still pumping and the team meets for an additional three hours over a dinner on Fisherman's Wharf in San Francisco. The process has created a strong bond.

ONE MONTH AFTER THE TRADE SHOW

It's now time for a full debriefing. The KIT leaders prepare a report on each KIT and, where appropriate, distribute it to all participants. During a conference call they discuss findings and recommendations arising from the participants' plans. This is the final chance to input information, assist with the analysis, and discuss the process.

The training lasted four months. Friendships have been made, and information has been shared. By learning through doing, participants have developed an understanding of the concepts of intelligence.

In a trade show environment, participants learn in particular the need to adopt the intelligence plan. Without KITs, KIQs, and KIIs, participants are overwhelmed at shows and miss valuable collection opportunities. By running through the intelligence cycle each day, they can discover that they have the wrong information now, and not wait to find this out until they return home, when it is too late.

Trade shows are the perfect environment to teach the discipline of intelligence and why it is needed. Providing the training in an environment that participants are familiar with (a trade show in their industry) makes it easy to relate the training to their jobs.

The training approach is catching on quickly in Canada. It has been used for four major trade shows in the last year and commitments are in place for as many as a dozen more in the next 12 months.

The process is intensive, exhaustive and a lot of fun. But then again so is intelligence.

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Event Show Intelligence: Examples of Successful Projects

with Kent Potter and Nancy Potter

Competitive Intelligence Magazine, March/April 2009

As Monty Python said, “And now for something completely different.” This issue’s event intelligence column seeks to do two things:

- Provide ample examples of the usefulness of event intelligence which you can take to your senior management.
- Encourage members to share their experiences. This important process begins when you use open-source methodologies to build a depository of trade show intelligence experiences.

If you review my past columns, you will see that the dominant focus has been on the process of event intelligence and how to improve it. Topics have included collection, planning, communications, partnering, counterintelligence, international dimensions, and more. I continually receive requests for examples of where event intelligence has been successfully applied. You need this information for two reasons:

- You will gain innovative ideas about how events can be used to produce intelligence.
- It will help you build a successful event intelligence program by inundating your senior management with countless examples of where events have led to actionable intelligence.

This and future columns will build not only on my experiences, but also on those of my competitive intelligence (CI) colleagues. The set of examples in this article were developed during the two days I was privileged to spend with Kent and Nancy Potter. Their willingness to share their business model and examples allowed me to create additional event linkages. So, in true open-source fashion, these examples now go into the public domain and I add their names to my byline.

TWO WAYS TO LOOK AT EVENTS

How do intelligence professionals look at events? While discussing this with the Potters, we focused on the information that can be gathered at events due to people’s willingness to talk in such settings as well as the opportunity to validate existing information and hypotheses due to an overabundance of collection opportunities. Many intelligence professionals look at their existing Key Intelligence Topics (KITs) and from them identify opportunities at the show to validate information and fill in information gaps. For example, events provide opportunities to pick up the information required to complete a competitor profile or acquire customer information that will update their profiles. They also afford the opportunity to conduct an interview or two to confirm an industry or technology trend.

You can also look at an event as an opportunity to complete an intelligence assignment from beginning to end. On one of my first event intelligence missions, I was approached at the end of the show by my client, who told me how successful the event intelligence model was in fulfilling his intelligence needs. When I asked him for an example of this success, he said he was able to validate a six-figure consultant report he had commissioned to identify certain industry trends and opportunities.

On the surface, his was a good example of the successful use of an event to validate existing information. But I told him that I saw his perceived success as a failure, a missed opportunity. “Given that you were able to validate this report so easily, couldn’t you have saved yourself all that money by identifying the trends and opportunities at the event yourself?” Had he brought one or two additional people to the event with him, in three days they could have written the entire report, at a huge cost saving.

CORE INTELLIGENCE PROJECT

Two questions I posed to Kent and Nancy Potter during our time together were:

1. What are your core intelligence projects?
2. Can an entire project be conducted at a trade show?

I asked them specifically, “Why view trade shows as a separate product? I am looking at all your product and service offerings. In many cases, these offerings can be made in their entirety at an event – and probably for a lower price than offerings made in more traditional ways.” Instead of looking at trade shows as a line of business, I suggested they look at their traditional products and services, and then ask clients how they would like intelligence collected and developed using an event intelligence approach.

This idea made sense to them. So off we went to the Potter library, looking for concrete examples of what could be done in its entirety at an event. The following case studies surfaced as a result of our search.

EXAMPLE 1 - PARTNERING INTELLIGENCE: A CARBON BLACK MANUFACTURER

Carbon black is a substance that increases the durability of automobile tires. It is a principal component of many industrial dyes and inks. Seeking a higher-end market, one of the largest US-based makers of carbon black found a new potential market for their higher-end products in the fuel cell business. They hired nanocarbon engineers and began making catalytic materials for fuel cell manufacturers.

The problem was that they (the client) arrived late to this market, and other manufacturers had already entered it. The manufacture of successful fuel cells was still in the developmental phase. A complex undertaking, it involved many different entities and was often government funded. (Note: there is still no strong retail market for fuel cells.)

Enter the trade show. The company employees attending the trade show received intelligence training and brought outside intelligence support to the event. The intelligence project, conducted in its entirety at the show, was held at the annual conference for the fuel cell industry. The team applied decision culture analysis techniques to assist in identifying relationships and successfully targeting potential partners. Using that intelligence process, the team successfully probed existing relationships. The company wrapped up partnerships that ultimately resulted in the company’s technology leapfrogging over that of several competitors.

The company's managers estimated that training in advance of the event and event attendance cost approximately $45,000. But the partnerships that emerged were potentially worth millions. Perhaps even more important, they estimated that making full use of the trade show event saved them about 8 months of work.

EXAMPLE 2 - MARKET ENTRY ANALYSIS: ENERGY EQUIPMENT MAKER

A maker of energy equipment applied trade show intelligence techniques to accurately characterize the US market for a specific type of power generation equipment and identify potential candidates for acquisition. Armed with a list of indicators required for a market profile, the company used the show as an opportunity to both collect and evaluate this information.

Their attendance at a single conference yielded valuable research results. They calculated that the total value of the effort was about $60,000 more than what it had cost them to send the team to the conference.

EXAMPLE 3 - OVERNIGHT DEBRIEFING

Overnight debriefing is a good example of how you can overlay the entire intelligence process on the traditional trade show sales approach. In this case, one salesperson who was not CI-trained gathered information at the event with the aim of increasing the company's sales. He was supported by an intelligence process conducted primarily outside the event environment.

Much to the chagrin of his peers, a high-technology manufacturer was able to send only one sales engineer to a technical conference in Hawaii. To make up for the inability to send a whole team, the engineer applied an intelligence approach that provides incorporated debriefing sales prospects. With this approach, the engineer would phone a professional debriefer several times each day and share the information he had gathered at the show.

The debriefer recorded his calls with the engineer and sent them for transcription in Asia. There, an intelligence person would review the transcript to identify specific opportunities. As a result, each morning the sales engineer in Hawaii had a record of each of his key contacts from the previous day – including positive leads and competitive threats. This enabled the lone salesman to capture the full value of each contact every day – and to build on his successes the next day.

EXAMPLE 4 – DECISION-MAKER ANALYSIS IN SUPPORT OF SALES: SPECIALTY CHEMICAL COMPANY

A small specialty chemicals company developed a particularly useful reagent that was difficult to manufacture and dangerous to handle. This reagent had several known uses for which there were few substitutes, but not in sufficient quantities to justify the cost of making and transporting such a dangerous compound. The company determined that they would need to sell at least $25 million of reagent in the first year to justify the costs of their new product.

When exploring market uses for their reagent, the company ("Silibant") discovered that one of the world's largest pharmaceutical companies ("Driggs") was awaiting final FDA approval for what promised to be a blockbuster, high-revenue new drug. Sibilant also learned that the manufacture of Driggs' new drug would require the use of a reagent with properties similar to Sibilant's. But Driggs had never heard of Sibilant and was known to purchase critical supplies only from long-term suppliers. To make things worse, no one from Sibilant had been able to make inroads at Driggs.

The situation looked bleak for Sibilant at first. Then, during a Sibilant market strategy meeting, someone noted that Driggs had recently bought another pharmaceutical company, Metzger, and that the staff of Metzger would likely have a substantial role in finalizing preparations to manufacture and sell the new drug.

This created an unexpected opportunity. In only four months, a key specialty chemical conference was scheduled to be held in Frankfurt, Germany. Sibilant was already scheduled to attend. Key individuals from Driggs – and from their new acquisition, Metzger – would also be there. Would Driggs' staff changes create an opportunity for a new supplier to get an audience? If so, how?

The outside competitive intelligence team met with their client, Sibilant, and facilitated a workshop to generate questions to which Sibilant hoped to find answers at the upcoming exhibition. All questions focused on the decision culture at Driggs. They included:

- How much actual reagent might Driggs require for the manufacture of their new blockbuster drug?
- On what basis would Driggs make the choice of a reagent? What would the decision map look like? Who would be involved? What, if any, influence would former Metzger procurement personnel have in the process, and at what point?
- Would the newly reframed Driggs Corporation entertain new vendors? Which people within Driggs would be most resistant? Who would be most supportive?
- Once key decision processes were identified, how fast were they likely to move?
- Which competing reagent suppliers, if any, were already positioned to take this business? What might their weaknesses be? Were any key decision-makers within the Driggs/Metzger establishment particularly concerned about their reagent supply?
- Once key decision-makers and decision influencers were identified, what were their profiles and interests? What would capture their interests, convince them of truth, and motivate them to act?

Once they had framed all the questions, the Sibilant workshop attendees were trained in the art of conversational intelligence, a benign form of elicitation ideal for this sort of intelligence collection. The company reserved space at the conference venue which would serve as a war room, and the trade show team designated several locations on the conference floor as debriefing sites. The two-person debriefing team met with each Sibilant salesperson at least three times a day. At the end of the day, the entire event team came together to share key findings.

The results were remarkable. On the first day, the team didn't acquire much information. They mostly received a lot of FRED on participants. (FRED describes the source information elements normally required to build win-win and win-neutral relationships with people in the know.) By the second day, the team had developed an idea of how much reagent Driggs would need. By the end of the third day, the team had developed an entire map of the Driggs decision process, along with a clear picture of who influenced whom on that map – and where the pitfalls and rough edges were.

Two weeks after the conference, the intelligence developed from the conference work resulted in a sizable sample order – much larger than Sibilant had expected to get – and the promise of substantial additional orders to come. Sibilant far exceeded its market goals, making about five times more from its new reagent that year than they had projected. They gave much of the credit to disciplined intelligence collection and the detailed analysis of Driggs' decision culture.

As the examples above illustrate, decision-maker analysis, strategic scanning, market influence studies, research, competitive position diagnosis, sales leads debriefing, and sales process analysis can all be accomplished at a trade show. Even certain aspects of security diagnosis – where you are vulnerable – can be conducted at an event. What better opportunity might you have to check for your company's information vulnerabilities than at an event where so many of your employees are talking to industry people, including competitors?

I encourage you, my readers, to take these examples to your management and to fellow employees who doubt the power of events. Show them how events can be cost-effective when combined with the intelligence process to develop better leads, conduct research, develop profiles, and so forth. Hopefully, the case studies discussed in this column will stimulate your imagination regarding what event intelligence can do for your organization.

I will highlight more examples in my next column – these are provided by Mike Sandman from Fuld. Between now and the next issue, we will get them ready so that you can view them and learn from them. In the meantime, I challenge each of you to email me your event intelligence success stories, whether a completed intelligence assignment or that gem of information that proved so essential to your intelligence program. The more examples we share, the easier it will be to educate our intelligence users on the benefits of intelligence in general and event intelligence in particular.

And Now – A Message from our Members

with Anne Barron, Abcomm Ltd

Competitive Intelligence Magazine, January/February 2006

When I started this column series, one of its objectives was to provide an opportunity for SCIP members to tell others about their trade show experiences and lessons learned. Up to now, I have only talked about my own experiences. Now it is time to learn from others.

This issue's column is the first in what I hope will be many more columns on members' experiences. By sharing our stories and lessons learned, we can develop a bank of event intelligence material that can be used by all SCIP members to help their company's event intelligence programs.

In today's column, Anne Barron provides readers with a few of her stories. Anne is a frequent speaker on trade show intelligence at SCIP conferences and president of AbComm Ltd, an exhibit management and education firm. Here Anne talks about using trade show intelligence to help a company in its re-branding efforts and a government agency get up to speed with trade show intelligence.

CASE 1: THE SOFTWARE FIRM

The Situation

A leading Canadian software firm undertook a corporate re-branding exercise. With the help of ABComm, they conducted an assessment of their overall trade show participation strategy, including an analysis of traffic patterns, staff interaction and effectiveness, and lead capture methods. An evaluation of the effectiveness, design, and impact of their trade show booth was also required.

The Action Plan

We developed a program using several techniques to evaluate the company's booth and compared their marketing activities at specific shows to those of their key competitors. We monitored competitors several times daily on the show floor, during conference sessions, and at networking events. We also monitored several of their key competitors' "Partner and Technology" pavilions.

We gathered data on all competitors and analyzed it using several pre-determined key indicators. In addition, we monitored other trade show-related marketing activities, such as public relations, advertising, hospitality events, in-booth presentations, product demonstrations, printed marketing materials, and trade show giveaways. From this we compiled a report and used it to establish a benchmark for future corporate marketing activities.

Based on the results of this initial analysis, the company decided to evaluate and compare four additional trade shows to provide insight into the marketing activities within the specific market sectors and geographic regions of their key competitors.

The Results

The findings from these additional activities contributed to the company's decision to make significant changes to their overall trade show strategy, including:

- Completely re-designing their existing trade show booth to accurately reflect their new brand and re-position the company to their customers, prospects, and competitors.
- Gaining insight into current and future marketing trends and activities of their key competitors.
- Establishing a more strategic approach to trade show participation with respect to identifying key shows, targeting specific geographic regions and market sectors, and determining the appropriate level of participation and positioning at each trade show.
- Understanding the value of pavilions as a medium for achieving specific marketing objectives.
- Incorporating vendor pavilions into other customer-facing events, such as user conferences and product seminars.

We also recommended that the client's brand, images and messaging be consistent at all shows. This improved the customer experience at subsequent industry trade shows and at their own user conference.

Experiences Gained

The value of competitive intelligence (CI) at events cannot be underestimated. The software company gained unexpected insight into key competitors and industry events. This resulted in an overall improvement in the execution of their corporate re-branding strategy, and in the development of ongoing corporate marketing strategies, resources, and budgets.

This type of analysis benefits organizations by providing a means of identifying industry segmentation and adapting or changing their marketing strategies to address specific geographic regions and markets.

CASE 2: THE GOVERNMENT

The Situation

The Business Development Office (BDO) is part of the Information and Communications Technologies (ICT) Branch of Industry Canada. Owing to its unique knowledge of the ICT sector, the ICT Branch influences policy and decision-makers to position Canadian companies for growth and innovation in the global ICT marketplace.

The role of the ICT Branch is to advocate, facilitate, measure, and forecast as well as promote the interests of the Canadian ICT sector. The BDO provides business development services to exploit commercial opportunities for the ICT sector.

As such, the BDO of Industry Canada attends many international trade fairs through trade missions, Canadian pavilions, and other venues. The BDO team typically works with colleagues from International Trade Canada and Regional Trade Networks. BDO team members need to keep up with industry trends, including competitive intelligence, as they pertain to their geographic and specific market sectors.

While BDO team members are experts in their field, there was a need to polish their skills to maximize results. Ongoing training would ensure that they were aware of the latest technology, tools, and trends available to them.

We developed a half-day workshop for key members in BDO who regularly attended trade shows. Participants focused on the latest information-gathering skills and developed reporting templates. Open discussions also allowed participants to clarify and develop on-site techniques to use at future events.

Results

BDO team members now spend more time prior to their key events planning and developing their strategy for on-site CI activities. Also, the BDO now has a more streamlined reporting process after each event.

Lessons Learned

Training reinforced to both the team and management that there is an ongoing need to train staff in competitive intelligence techniques. Also, the BDO supports lifelong learning and the need to update and refresh skills. Pre-planning, documenting, and reporting results are essential to ensure consistent evaluation of events and effective sharing of information with internal and external clients.

The Value of Being Prepared

Through Anne's experiences, we can see the immense value in being prepared for events. The training itself can even be a catalyst for interesting results. For example, in one of her assignments, she was hired by Itron Inc. (a global solutions provider and source of knowledge for collecting, analyzing, and applying electric, gas, and water usage data) to train its team of CI professionals on techniques to refine their information gathering at industry events. The training focused on what to do before, during, and after events.

Company personnel then used the training concepts and interviewed their internal clients prior to the show. The results: they discovered that much of the desired information already existed in-house. The internal clients simply did not know who had the information or where or how to find it.

An important role of any CI organization is to know internally "who knows what" and "who has what" CI, which is not just looking externally; you need to know where the knowledge and information exist. "CI is an integrative function," stated Itron's director of market intelligence. Having the internal knowledge network in place, Itron's CI team was able to deliver almost half of the requested information prior to attending their major industry event. This allowed the team to focus on the unknown elements while at the show.

MAJOR LESSONS LEARNED

Anne has a plethora of stories to tell SCIP members, based on her many years of experience in event intelligence. I asked her what key lessons she has learned about event intelligence, and what specifically she wanted to pass on to our readers. Here is her response:

> ***"Diligently and consistently conducting on-site CI at industry events enables organizations to identify what they do not know and to find the unexpected intelligence that may significantly change the course or direction of the organization. At most shows, I confirm about 80 percent of what the client already knows or has suspected. It is the 20 percent we don't know yet that we call the "WOW" factor. Typically, 20 percent of the intelligence we bring back provides significant insight into the competition or industry as a whole, and the organization did not previously know, see, or acknowledge it."***
>
> ***"Most organizations think they do a good job at collecting CI at their industry events. In fact, most do not. They have no system or process in place to gather intelligence effectively and consistently monitor key competitors, partners, or their industry. They do not have a clear picture of where their organization fits into their industry. They do not have a clear picture of their ROI at these events. In almost all cases, implementing a CI program at trade shows allows organizations to significantly improve their ROI with minor modifications to current marketing programs, without increasing their budgets."***

Creative Event Intelligence at PITTCON

Competitive Intelligence Magazine, April/June 2014

Two themes in my column over the past year have been the need for intelligence professionals to better align with their organizations' objectives at trade shows and the need to use events to gather customer intelligence. This was driven home to me during my attendance in February at PITTCON. PITTCON is a leading trade show for laboratory equipment. According to PITTCON, "Key decision-makers attending the conference account for 80 percent of the attendees who rely on the exposition to identify or finalize the purchase of laboratory products for their organizations."

In this issue I lead readers through a case study on one my recent event intelligence missions (and one of my most successful ones) at PITTCON. The focus is on creativity in the event intelligence process and (what I hope readers will find interesting) ideas to make their event intelligence programs more effective.

PITTCON certainly provides an opportunity for competitor intelligence as, given the type of attendance (key decision-makers), major competitors in the industry should all be at the event. However, if 80 percent of the attendees are there to buy, it is also a unique opportunity to develop customer intelligence (if you are a manufacturer of laboratory equipment). Also, if 80 percent of the attendees at the show – that means most attendees (and perhaps one of them is your company) – are there to buy laboratory equipment, then this is a show where the intelligence process should be used to help your company make a better buying decision. Clearly PITTCON is a show where the dominant objective of those attending is part of the equipment purchasing process.

The reason I was at the show was to help my client plan their food laboratory equipment purchases for the next five years and to help them track technology changes which could arise over the next five to 10 years, affecting future purchases. To be clear on the intelligence needed and the decision, the client invested millions of dollars in food-testing equipment. Knowing the direction of technology, what is coming out next can have a significant impact on purchasing decisions, and the intelligence I developed at the event (as I will discuss in this column) also ended up having huge implications for human resources and strategy.

The PITTCON event provides a huge opportunity to gather information and develop intelligence to help acquire the right equipment, but it is also a very complex event to manage as it is very big: over 16,000 conferees and exhibitor personnel, 1763 booths, over 2000 technical sessions in 73 symposia, 10 awards sessions, 84 oral sessions, 4 workshops, 51 poster sessions, and 116 short courses (from PITTCON materials). In addition, similar to many events I attend these days, PITTCON also conducts parallel focused conferences. These are typically one- or two-day events embedded within the trade show, but normally in an area separate from the main trade show in which you have presentations, exhibitors, and networking events focused on one or two areas.

At this year's PITTCON was a two-day parallel conference called "FoodSafetyTech Food Labs Conference: Compliance, Technology and Best Practices". Needless to say, for anyone looking at the future of food lab technology, this certainly was a conference with the right title. A check of the topics being covered in the parallel conference confirmed this. For example, the conference had a presentation with the title, "Food Labs, Present and Future Technologies", and another with the title, "Food Labs of the Future".

Like any good event intelligence practitioner, I clearly identified my information needs and looked at all workshops, poster sessions, booths, short courses, technical sessions, and parallel sessions, and identified which ones were pertinent to my client's needs.

CREATIVE TIP #1:

HOW TO LOOK AT SESSION, BOOTH, WORKSHOP DESCRIPTIONS

When I look at the descriptions of the sessions, there is a bit of creativity involved. The simple and uncreative way is to look at the title and ask: Is the information being presented pertinent to my intelligence needs? The creative approach starts with the information needs associated with the session and then adds the following:

1. Even if the topic itself is not relevant, are the speakers relevant to my intelligence needs? If yes, I know where they will be – at the session, and I can ask them questions after they speak; before is bad timing as they are getting ready to talk.
2. Will the people who attend the session be people that I want to talk to? If the answer is yes, I get to the session before it starts and interview them; afterwards tends to be difficult as that is when I am interviewing the session speaker. PITTCON had a few of these kinds of sessions which I felt were critical to attend.

Points 1 and 2 above are associated with the source part of my intelligence plan. It requires that I look not only at the session from the perspective of the information needs part of my intelligence plans, but also at the source part (that is, who I needed to get the information from).

CREATIVE TIP #2:

CONFERENCES EMBEDDED IN TRADE SHOW'S DEMAND SPECIAL ATTENTION

Next is the plan for the parallel Food Labs conference itself. For intelligence practitioners, this is a unique opportunity: two full days where 50+ people with a common interest are going to be together. Even the booths (there were a few in the conference room) will have the same personnel for the two days. The speakers for the most part were also at the event for two days.

This is two days of relationship building, opportunities for directing multiple questions at people who are expecting to be asked questions. This is also a place where you had better practice the highest ethical principles, as advocated by SCIP: a clear identification of who you are and your purpose, no misrepresenting. Violating SCIP ethical principles is never a good idea and when you are spending two days with the same people who are experts, doubly so.

Many years ago, Kent Potter, a prominent SCIP member and CI consultant, taught me that interviewing is about developing relationships, not about taking. Following his advice and sticking to SCIP guidelines and the collection plan, here are some of the different types of people I interviewed and the objective behind these interviews.

Journalists: Several journalists were in the room for the conference, from laboratory equipment and food industry magazines. Journalists from specialty magazines are great to talk to as they have overview knowledge of the industry that they cover as well as in-depth knowledge that comes with being a specialty reporter. Realizing that they would have interviewed many of the manufacturers, I asked each one what they saw as the trends, what the different exhibitors were pushing, and so forth. One of them invited me to one of the major trade show social events, another unique opportunity.

Equipment vendors: A few of the speakers, most of the boothers, and several of the attendees came from equipment vendors. I wanted to know from them what the direction of their technology was and where their company was going technologically over the next five years. I had a great lunch on the first day with two different vendors from the conference (at the same table). It was a fantastic and very friendly conversation, and I learned a lot about their vision of the future. One of the advantages, by the way, of getting to know the vendors well during the two-day conference was that when I visited them at their booths at the main trade show, they introduced me to their staff. I was more of a friend now than a customer. There is much more you can learn when you are not being treated as a customer (or a competitor).

Buyers: At a conference focusing on food labs, it should come as no surprise that lab managers were in attendance as well as those that support lab managers. These were great people to talk to. I asked them how they made their decisions, what they were considering buying, and why. You learn a lot when you bring together people who have already done a lot of the research.

Speakers: As mentioned earlier, there were several presentations during this parallel conference that were relevant to my KIT, which meant that the speakers for each were important to me and I definitely wanted to ask them questions. First, I ensured that I asked each of these speakers questions at the end of their presentations (this is one way to make your presence known), and second, after they had finished their presentations, I was sure to introduce myself, my purpose at the event, and continue the discussion from there. The key issue in the timing of these questions was if the speaker indicated that they were around for the remainder of the event. I did not rush the stage with the rest of the attendees, right after the talk, to ask questions. Instead I waited until an appropriate time during the event when they were more or less alone. In this way, there is less time pressure and a more in-depth conversation can ensue.

Two days of a conference – managed using event intelligence principles – and another day on the exhibition floor, coupled with the occasional poster session and technical session visit, and I emerged with a lot of information that helped my client make smarter purchasing decisions. Even better, a common theme emerged during these conversations and presentations which suggested a potential change in the paradigm. Major trends identified included big data; the push for the sharing of DNA and other testing databases; advances in metagenomics; increased functionality of hand-held and other portable testing devices; a push globally for interoperability of testing equipment; and increasing automation (one vendor had a solution that automates six out of eight testing steps, including media preparation, dilution, inoculation, filing, reading and reporting). These trends and changes are going to lead to significant redesign in labs, lab functioning, and, most importantly, a major change in personnel requirements and the role of lab managers' – a result that I will be reporting to the head of strategic human resources at this organization.

For me, it was a great three days, and I must confess that I miss many of the people that I met in the two-day conference. Fortunately, several have been emailing me to find out if I will be going to their next event, so the relationship can continue (if my client will send me there). More importantly, the client was very pleased with the report, which was presented not just to the client but was also shared with some of their partners. As a result, the client is now looking for a way to make event intelligence-type reporting a requirement for those who attend events.

Helping Your Organization with Their Event Intelligence Needs

Competitive Intelligence Magazine, July/September 2013

This summer I had a very unique event intelligence experience. I went to Cine Gear Expo Los Angeles, the largest and most important event of its kind in the USA. It's recognized as one of the top film, video, and digital media trade shows. The event was on the Paramount Studio film lot in Hollywood (a real cool place to be) and hundreds of exhibitors across the range of the film industry products and services occupied several stages and production streets. It even included seminars, workshops, receptions, and parties (Hollywood loves its parties).

I was at the show with a local Hollywood production company. The company did not have a booth; they were not here to find out what the competitors were up to (the dominant reason for going, according to the recent Fletcher CSI study). I was not even there in the context of event intelligence. I was there as part of the company helping it accomplish what most companies go to trade shows to do (more on that later). What I learned from that show is the subject of this article. It's about how we, in event intelligence, and thanks to the skills and knowledge that we have, can play a big role in helping our company attain its objectives when attending events.

Why was I at the show and in Hollywood? Once every year or two, I help one of my close friends make a movie (I used to be in that industry). As part of the pre-production, I was in the area for a few days to help with on-site locations, logistics, and other production details. While there, he asked me to go along with him to the show; he said it would be a lot of fun. Who was I to say no?! "Don't worry," he said, "we won't be there for long and after I will take you to a major Hollywood party" (that will be a subject for a later column). I would have gone just for the intrigue of being at Paramount studios; I would have gone simply because my friend asked me to. But given that I study, write about and work in event intelligence, I was especially excited to go. So, the rest of this article is about my odyssey at Paramount studios and how I tried to use my knowledge of event intelligence to help my friend at the show.

HELPING THEM PLAN – THE INFORMATION THEY NEED

I got into LA the night before the show. I asked my friend why he was going, and what made this show important to him? His answer was very clear: "In August, I am shooting my next movie and I need to buy a new camera and get a film crew. Both should be at the event. This promises to be a technology/product acquisition intelligence topic and a human resource topic."

The Fletcher/CSI study that was part of a recent Frost & Sullivan webinar reported that the #1 objective of CI collection at trade shows is to learn more about your competitor's new products. I have been going to shows for years and while there is no question that investigating competitors is a dominant objective at trade shows for intelligence professionals, it is not the top reason why people attend.

Think about it. Why do you think companies have booths at shows? Not to focus on competitors, but to tell customers about what they have. Why do you think most people attend a show? Surveys say it's not primarily to learn about competitors. When I talk to executives and others who are attending shows, about why they are there, the response that my friend gave, that he needs to buy a product or find possible employees, is not that unusual. These are more common (let's call them) KITs that "non" CI professionals (let's call them organizational staff) have at events. Add to this, finding potential sales opportunities, joint venture opportunities, market information, trends, etc., and you have more of what I have seen when I talk to people about why they are at the event. I have written in the past that while understanding what competitors are up to is an important topic, for most of the executives I deal with there is more of a focus on new business opportunities and technology.

This got me thinking – could I use what I know in event intelligence to help my friend deal with these kinds of intelligence needs?

Into CI planning mode I go and I ask my friend: "You seem clear on your information needs, so what booths are we going to? Who are we meeting?" His answer was: "When we get there, we will look around, see what's of interest, and browse." "That is not the way we work in event intelligence," I told him. "With the size of this event, it is important that we have a good sense of where we are going and why."

We sat down, looked over the list of exhibitors, checked their locations, and made a plan. While going through the materials with him, I obtained a better idea of his information needs. For example, he talked a lot about the drones at the show. Drones used for film-making has become big as the technology has got better (thanks in no small part to research on military drones). We will be shooting in Arizona with a drone, so there are some questions we need answered at a technical level; we identified some booths. He also focused on lighting and gel companies. The star of this film is a dog, so we need products for lighting that will not cause the dog's eyes to look red, which is a common problem when you film animals.

The more we looked at the event materials and talked about the event, the more I also become aware of exactly what he was looking for and why. In turn, I was able to help him plan more appropriately. The true needs therefore were:

- **a.** Look for a film crew who is prepared to charge a reasonable rate.
- **b.** Find a camera with advanced technology that will reduce the red eye effect on the dog.
- **c.** Find lighting and lighting product solutions that (again) deflect red-eye concerns.
- **d.** Get answers to drone questions relating to the site we have selected.

Based on the above, I helped identify booths to visit and paths to follow.

CI's Contribution

Helped to more clearly identify the information needs and the booths to visit at the event, as well as the information and sources required to "improve" his product (the film).

WE COLLECT BY INTERVIEWING; HOW DO I REACH OUT TO PEOPLE, HOW DO I NETWORK?

Not everyone is an extrovert who looks forward to meeting strangers and eliciting information. It's tough. I have brought enough groups to trade shows to know many people are introverts, plus there is a lot of research to supports this. That being said, my friend's information needs did require reaching out and talking to people. Asking exhibitors questions is one thing – they are in the booth to answer questions. But I wanted to talk to other consumers and users of these products and services and ask for their opinions, not just the "salesmen" whose job it was to sell them.

My friend asked, "How do you go up to people you don't know and ask questions?" I often get asked this question from CI practitioners, so I am not surprised when non-CI professionals, those who attend trade shows on behalf of their companies, ask me this. I went into CI teaching mode: "I can help you network better. CI has a lot of material on how to conduct effective interviews. There are numerous books on how to network effectively, so a CI event intelligence practitioner should have no problem giving his or her corporate team tips on how to 'work the show'."

The first thing I told him was that, in general, people are at the show to talk; they are ready in friendly mode. Second, you should look for commonality between you and the target. This is probably one of the top elicitation tips that I have read in SCIP literature. "How do you do this?" he asked. I was back in teaching mode: "Watch me," I said. We picked a few targets, two cinematographers and another, a lighting specialist.

The cinematographers: I looked at people's badges and found one that said "Cinematographer". I went up to him and said, "This is my first time at Cine Gear (which is true); what the cool giveaways are?" (I noted that he was carrying several bags of trade show giveaways.) The target opened up his bag and showed me what he had and what he thought was the best giveaway. We started up a conversation and I soon knew what he thought was interesting. This was a terrific conversation starter and knowing what he liked was a good way to start to profile him. My friend thought it was great.

There was another person whom I homed in on who had "Cinematographer" on his badge, and I saw him talking to people at the cinematography union booth. I asked my friend what stood out when he looked at him? In CI we notice things. He didn't see anything. He looked like he worked a camera (which was correct), which could be a conversation starter in its own right, especially for my friend who is a producer. Here is what I saw: we were in LA and the person was wearing a Chicago Blackhawks (hockey) jersey. The point is, the NHL (National Hockey League) playoff semifinals were on, LA was playing Chicago and this guy was in LA at a trade show wearing a Chicago Blackhawks jersey (the enemy). If this wasn't a giant "I want to be noticed, talk to me" sign, I don't know what is.

The lighting specialist: This one was actually at a booth. We needed ideas on gels (the transparency-type materials that you put in front of lights) and the lighting to reduce the red eye in the dog. My friend asked the questions and received a very good and quick technical answer. He then said that it sounded like an expensive solution, at which point the exhibitor gave him a pained look. I countered this with: "What can I tell you; we are Canadians with low budgets." (I said this because I noticed a maple leaf on his bag.) "You're Canadian," he said, "me too."

It took 30 minutes to get out of this booth, but by the time we left, we had a very inexpensive solution, a sample to work with and a new friend to contact if we had any problems. It turns out he has worked in Canada with many of the people that my friend has.

CI's Contribution

Training in how to network, how to initiate dialog, and what to look for.

HELP THEM ASK THE RIGHT QUESTIONS

If I had not heard the conversation, I would never have believed it. My friend wanted a camera with advanced technical features to deal with the issues mentioned earlier in this article. He stopped at the Canon booth and started talking to a technical specialist (not a salesman). The question my friend asked was, "I bought a Canon camera several years ago and really liked it; what's your best camera with the best technology, at a good price for filming?" For the next five minutes, my friend and the Canon technical specialist talked about technical advances and what they allowed you to do cost-effectively on a set. He explained how this particular camera (identified by the Canon rep) was the best and not the most expensive. He talked about how technology had changed since my friend had bought his last camera from Cannon. It was a great conversation and I was impressed with my friend's technical knowledge and that of the Canon representative.

We appeared to be getting closer to picking a camera, but my CI senses were tingling. Something in the conversation seemed wrong and it tied into something that I talk a lot about, called individual context. Everyone has a context when they ask or answer questions and, unfortunately, very few people explain this context well. My friend was looking for advanced technology that would deal with the red eye problem and handle hot climatic conditions when shooting. He used the term "best technology" to encompass all of this. The Canon exhibitor answered on the basis of his expertise. He was in development and knew what features would truly lead to better filming quality and which ones were – shall we say – toys and marketing gimmicks. Each was talking advanced technology, but each meant something slightly different.

In CI, we talk about open-ended questions (tell me about the technology) and closed questions (will this camera reduce red eye in dogs?). We know why you need to use a mix of question types to get the required information. The entire conversation covered largely open questions. It was time for a closed one. I told my friend to tell the Canon rep what his technical problem was, what he specifically needed the camera to do, and what he liked about the old camera and its features. The Canon rep listened in and said, "Oh, that's what you mean by 'best technology'. For that application, let me show you what the best camera is. In fact," the rep continued, "the camera I just was showing you is not suitable for you as the feature you need isn't available. Your old camera is better than the one I was showing you!"

CI's Contribution

How to phrase questions and put together an interview script.

CONCLUSION

Organizations send staff to events for many different reasons. Primarily it is to gather information to help make decisions. For example, (like my friend) it could be to decide what equipment to buy and what staff to hire, or (in the case of a customer) it could be to look for new products to develop or identify joint venture partners. There are many others. Unfortunately, as I have seen over and over again, many people going to events are not aware of event intelligence and how various techniques can help them realize their information and decision-making objectives.

This article has shown how our planning skills, and knowing how to network effectively, conduct interviews, and formulate interview questions can help companies meet their information requirements at events.

I hope that, in giving you the examples from Cine Gear Expo, I have stimulated your thinking in how you can help your organization's event participation – both by helping your organization achieve its true event objectives and helping your organization's staff to use their time wisely.

Section 2:

Skills and Techniques for Event Intelligence

Best Practices from Our Members: Time for an Event Intelligence Quiz and More

Competitive Intelligence Magazine, April–June 2011

This column is a bit different (aren't they all?). Several columns ago, I presented a series of forms. In the same genre, today's column presents a quiz designed to test if you are truly organized for event intelligence. The quizzes I create are enjoyable and designed to be completed with others in your organization who may not be as familiar with intelligence as you are.

My quizzes not only help make people competitive intelligence-ready but are also intended to educate people as to what intelligence truly is and build intelligence awareness. So, my instruction to you is to take the quiz while sitting around the table with management, employees and others, and go through it with them in relation to an upcoming event or a past event. Have fun with it.

However, this column has an additional twist to it – a challenge to readers. I challenge SCIP members to enhance this quiz. Email me additional questions you feel should be included and one of my future columns will include a revised quiz with your questions added. As an additional incentive, I will put your name next to the question so readers will know where it came from (if you want it in). I am starting off the quiz with only 35 questions (my competitive intelligence audit questionnaire has 100 questions in it). I am sure you can add many more to the quiz. I look forward to reading the more comprehensive, member-based questions.

Now, back to the current quiz. I designed it around the intelligence cycle, recognizing that event intelligence must follow the cycle. I could just as easily have created it around my 10-step event intelligence process (see Box 1).

Box 1: 10-step competitive intelligence process by Jonathan Calof

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

But as the intelligence process is the core of what we do in competitive intelligence, I've used it as the starting point for the quiz. As you go through the questions below, you can approach it in different ways. You can focus on a recent event to test what you have done, in which case make the answers yes/no based – you either did it or did not. You can use it as an opportunity to review procedures, educate management, and basically ask yourself: Does the practice make sense and if we are not doing it, why not?

If you want to assess all the events you have attended over the past year, then treat the quiz as a five-point Likert scale question (1=never, 2=rarely, 3=some of the time, 4=most of the time, 5=all of the time). This way you can work with management on building an events intelligence protocol. The questionnaire can also be used as a checklist for an upcoming event where you apply a yes/no approach but change the tense of the question. It's flexible, fun and educational, so enjoy the questionnaire.

SCIP is about sharing best practices, and over the past five years I have used this column to share with you my best practices and those of many of my competitive intelligence associates. Now it's time for you, our readers, to share your practices with others.

As I noted in another column, "'Form'ulating Your Event Intelligence Plan", forms like this one are key to helping competitive intelligence practitioners conduct world-class intelligence operations. Email your questions and forms to me at calof@telfer.uottawa.ca. Let's in a sense take a social networking approach with SCIP. I should have a lot of great information to share with you in the next column.

Box 2: Event intelligence quiz

PLANNING AND FOCUS (before the event)	
1	Prior to the event (and more than just the night before), I identified topics I wanted to know from the event, based on Key Intelligence Topics (KITs) and other information requirements.
2	I prepared a list of the key questions associated with each of these KITs that required answers.
3	I developed the KITs and information topics in consultation with senior management and other intelligence clients.
4	I reviewed all available pre-show materials to identify the people who might provide answers to these questions, and planned when and how to meet and talk with them.
5	I profiled all the people and organizations that I planned to approach at this event.
6	I created a list of questions to ask these people at the event that directly related to my KITs.
7	I re-checked with my colleagues/organization to make sure that they did not already have the information I was seeking.
8	All the employees from my organization who were attending the event were briefed on what information should be collected at the event.
9	I checked social networks associated with the event for people who might be able to help me collect at the event.
10	I analyzed the social networks associated with the event for potential sources of the information requirements previously identified in my event plan.
11	I prepared an event intelligence plan that clearly identified where my time would be applied at the event, and why.
12	I prepared collection forms that simplified the collection and assessment process and allowed whatever information was collected to be placed in a similar format.
13	I provided event intelligence-related training to all personnel involved in the event.

14	I assigned specific collections tasks to employees attending the event.
COLLECTION (during the event)	
15	I distributed ***the list of information needs*** to members of my organization who attended the event.
16	I asked suppliers, customers, competitors, government officials, etc. to help me obtain some of the information that was of mutual interest (they served as ***collection partners***).
17	I tasked people at headquarters to collect ***additional information*** that is best gathered by those not at the event.
18	I briefed all the people who were collecting for me on what the appropriate ***ethical approaches*** were for collection at the event.
19	The ***ethics code*** I applied at the end was at least as "strong" as SCIP's ethics code.
20	A ***secure location*** was available to store all information collected at the event.
COLLATION AND ANALYSIS (at the event)	
21	Collected information was entered into a ***database*** at the event.
22	The information contained ***coding*** that would help me interpret the information.
23	Every day I ***reviewed the results*** of the day's information gathering with my colleagues (or myself) and ***formed new questions*** based on these assessments.
24	Every night I ***analyzed*** the gathered information.
COMMUNICATIONS (at the event)	
25	I prepared ***daily communications briefings*** prior to the day's intelligence activity.
26	Our daily event intelligence communications were also presented to ***senior management*** as part of a briefing from the floor.
MANAGEMENT AND EVALUATION (during the event)	
27	I ***briefed*** management each night on our progress and provided them with an opportunity to ***comment*** on the next day's plans.
28	A ***central location*** at the event was established where people could bring their information collection forms/information collected.
29	I distributed a ***contact card*** to all event intelligence personnel which identified all event intelligence personnel there and how to contact them.
30	I had a ***daily briefing*** for all event intelligence personnel to discuss findings, plans, make course corrections, new ideas, etc.
MANAGEMENT AND EVALUATION (after the event)	
31	The event intelligence team ***evaluated*** the event results.
32	We held a ***debrief session*** with all involved in the event intelligence effort (including management) to identify areas where we can improve our event intelligence process for the next event.
OTHER	
33	We applied **event intelligence protocols** at all events we attended, not just trade shows but also conferences, workshops, our annual parties, etc.
34	We briefed all employees going to events on what information ***should not be discussed*** or exchanged with others.
35	A specific event intelligence **budget** existed for each event.

Trade Show Webinar: An Interesting Concept for Learning

Competitive Intelligence Magazine, May/June 2007

I often start these columns with comments on what an exciting time I had last month. Indeed, I am fortunate as an academic–consultant–practitioner to have the exposure to intelligence that I do. My latest foray was into the domain of webinars – specifically, a SCIP seminar given on the Internet. And what an opportunity it was.

The concept was relatively straightforward. We gathered together several of the chapter authors from the Competitive Intelligence Foundation's latest book, Conference and Trade Show Intelligence (2007), and asked them to provide additional insights and answer questions in their areas of expertise.

A QUICK RECAP

For those of you who were not part of the webinar, here is a quick recap of what you missed (you can also get copies of the book at the SCIP website: www.scip.org):

1. Two three-hour sessions (held on March 20 and April 10);
2. Lots of experts, including David Francis, Jodie Peake, Anne Barron, Kathrine Hayes, Jonathan Calof, Toni Wilson, Brian Soth, and Alison Bourey, shared their expertise on the following:
    - How conference and trade shows relate to intelligence
    - Ethics of trade show intelligence
    - What to do before the show
    - Mining conference materials
    - Key intelligence topics
    - Executing plans at the show
    - On-site tools and techniques for primary information gathering
    - Solo intelligence gathering, and counterintelligence
3. Hundreds of webinar participants, including an entire SCIP chapter as well as participants from Canada, the United Kingdom, India, Germany, the Netherlands, Portugal, Spain, Denmark, France, and several other countries;
4. Dozens of great questions asked by webinar participants;
5. More than 20 audience polls and quizzes designed to identify participants' conference and trade show intelligence practices.

Out of the many topics covered in the webinar and through an assessment of the questions that participants asked, two dominant areas of interest emerged:

- Interviewing tips, particularly how to get information from competitors when they know who you are;
- The ethics of conference and trade show intelligence.

Interviewing

Below are sample questions that the experts were asked about interviewing:

- When exhibitors ask who you work for, how do you respond?
- How do you avoid looking suspicious walking through the exhibit floor and looking for information?
- How do you ask questions without raising suspicions?
- What if we are not allowed into the competitor's booth? What should we do to collect competitive information?
- If it is a competitor, what would you say when asked why you are asking them questions?
- If you are a direct competitor of someone at a booth and are asking about their products and services, how do you answer the question, "Why do you want to know that?"

Without revealing all the webinar and book details, the following excerpts provide examples of what the experts had to say:

Most people at shows in booths are there to answer questions and are more uptight than you are. Be relaxed; but most important, be prepared. The more pre-work you do on the target, the more relaxed you are going to be.

You don't have to answer directly. Try clarifying first: "I'd like know...", "I'm not clear on...", "I'm trying to figure out..." Or tell them why you are asking: "I'm doing research...", "I'm trying to compare..."

Say something like: "I've heard that your products are fabulous..." It seems to placate the questioner.

Maybe this is a good place to bring in an outside consultant.

I answer honestly, as the SCIP code of ethics insists on not misrepresenting yourself. In fact, I typically wear a badge identifying the client or saying that I am a consultant. I have done this around the world and have not had problems collecting information.

Ethics

Another thread in the questions was a strong concern for what would be seen as ethically appropriate:

- Is it ethical to take one of my competitor's press kits from the press room?

- What if you catch a co-worker with a fake badge, what would you do?

- Could I use information that was gathered unethically by others?

- Do you recommend including sales teams in competitive intelligence ethics policies, procedures, and plans?

- Why is photographing public displays in the gray?

- At what point do elicitation techniques wander into the gray area?

Other lines of questioning were posed but interviewing and ethics dominated the question-and-answer sessions.

Participant Insights

But what about the participants themselves? What did we learn about them? What are their conference and trade show intelligence practices? Given the large number of participants, an examination of their responses to polling questions provided interesting insights into current practices.

As mentioned earlier, participants came from all around the world. Thirty-three (33) percent were solo collectors (not part of an intelligence team). All but four had been to a conference or trade show within the past year, and most indicated attending between one and four trade shows each year.

When asked if they had conference or trade show intelligence plans for their events, only 12 percent replied “always” and 39 percent responded, “rarely or never”. This result is consistent with past studies that indicate companies rarely plan for information collection at trade shows. Half did say, however, that they decided which shows to go to based on their key intelligence topics.

Ethics Policies

Given participants’ interest in the ethics of trade show collection, it was not surprising that 60 percent of the participants’ organizations had competitive intelligence ethics policies or guidelines (15 percent didn’t know whether their companies had these guidelines).

According to the audience poll (see Table 1), 67 percent indicated that their competitive intelligence ethics policies did not specifically address trade show intelligence collection. Therefore, it is not surprising that they raised many questions about the ethical side of collection at trade shows.

Table 1: Audience Poll

Does your organization have a competitive intelligence ethics policy that specifically addresses trade show intelligence collection?

Yes	
No	
Don’t know	

Table 2: Audience Poll

Are you comfortable walking into a competitor’s booth to get specific information you require?

Always	21%
Often	25%
Rarely	44%
Never	10%

Interviewing

What about the interviewing dimension? When asked whether they were comfortable walking into a competitor's booth to ask for information, not surprisingly, most were not comfortable doing so. According to the audience poll (see Table 2), 46 percent said they always or often were comfortable doing this. I wanted to introduce the 54 percent who were uncomfortable to the 46 percent who were comfortable.

The bottom line is this: for those SCIP members who are anxious at the thought of going to a competitor's booth and asking for information, several SCIP members are available who can tell you that it is not that bad and not that difficult. When asked to identify the most important tool or skill for performing competitive intelligence at trade shows, 80 percent replied that interviewing skills were key.

The message was clear from the panel of experts and the participants: if you want to do a good job at trade show intelligence, you had better brush up on your interviewing skills.

Counterintelligence

The final session of the webinar focused on counterintelligence. Up to this point, the webinar participants had been learning just how easy it is to gather information at trade shows. The flipside is that if it is easy for them to do so, it is also easy for others to gather information on them. Therein lies the need for counterintelligence.

How prepared were participants for counterintelligence? Surprisingly, not very, as 77 percent of participants indicated that their company did not have a counterintelligence program. For those with counterintelligence programs, many did not have a specific counterintelligence program for trade shows. Thus, the trade show information assets of the webinar participants could be compromised by competitors with well-run ethical intelligence programs and by those who use unethical techniques. Perhaps trade show counterintelligence needs to become a focus area in the future.

I hope you enjoyed the report from the webinar. The concept is an interesting one in that interaction is possible with question-and-answer sessions and polling. The only downside to the webinar was not being able to see the participants or talk with them during breaks, something I very much enjoy doing. Understandably, we did have our normal share of technical glitches. But if you are looking for a quick way to get information to a geographically diverse audience, this is it. Hope to "hear" from you at the next trade show intelligence webinar.

Ethics and Events for Conferences and Trade Shows

Competitive Intelligence Magazine, March/April 2008

Not long ago, a journalist asked me about conference and trade show intelligence. He began the interview by saying he had attended several trade shows and noted that he frequently heard people lying about their identity when attempting to obtain competitor information.

This was followed up with a story about a prominent manufacturer of appliances (such as stoves and fridges) whose employees would return to the show floor every morning and find their appliances taken apart. It appears that a competitor's employees had been entering the show floor after hours and taking apart the display machines to learn more about how they had been built.

In another case, a company employee posed as a journalist at a trade show and disrupted a competitor's product announcement. This faux journalist peppered the executive with questions designed to produce intelligence on the company and to also embarrass the executive.

It's Not CI

Far too often I hear stories about activities like these at trade shows. These situations are not competitive intelligence (CI) but industrial espionage. However, these stories do drive home your company's need for a good conference and trade show counterintelligence or security plan, given that these activities can occur. To prevent your own employees from crossing the line, you also need a well-defined ethics code for all personnel involved in your CI efforts at the event.

As Tony Wilson noted in my Conference and Trade Show Intelligence book, trade shows and conferences provide a greater number of situations where information collectors, particularly untrained, novice, or non-CI practitioners collect competitor information that can result in legal risks or public embarrassment for a company.

The temptation to do something unethical (forget SCIP's gray zone) is enormous at trade shows. I could fill this entire column with stories about activities ranging from getting people drunk to obtaining information using false identities and planting electronic eavesdropping devices, and I suspect I have not seen or heard it all.

I have heard of unethical activities being coordinated at the corporate level (employees being instructed to behave in this manner) and have seen rogue employees act on their own initiative. This activity is so tempting that people tell me to "cover up your badge and fool the booth personnel and you can get your competitors prices. Identify who you are and you are shown the door."

Little Value to Unethical CI Behavior

The problems with unethical behavior at trade shows are two-fold. First, in many cases, people will find out what you have done and it will damage your and/or your organization's reputation. For example, the journalist had many stories from his own personal observations and it places competitive intelligence in a bad light. It's hard enough to obtain corporate support for CI without having to constantly refute stories about industrial espionage.

Second, it's unnecessary. As has been pointed out by numerous authors, both in my conference and trade show intelligence book and in this magazine, acquiring information at trade shows is easy. Most people are there to talk and they do. Don't forget how much you can learn through direct observation.

Keeping It Clean

Here are a few pieces of advice should you find yourself in danger of straying over into the gray zone. If you ever find yourself considering any activity that suggests misrepresenting who you are, whether it is something as simple as covering up your badge or as sophisticated as altering your appearance, stop and rethink it. There may be a better way to get the information without crossing that line.

If you are not sure whether what you are doing is ethically right or wrong, ask yourself how you would feel if someone from the competition did it to you. If the action is improper if done to your company, then it's obviously inappropriate for you to consider doing it to your competitor. If you're still not sure, consult your company's legal staff.

PERSONAL JUDGEMENTS

Now let's make it even easier to act ethically at trade shows – make your conference and trade show intelligence ethics explicit with a well-defined ethics code of conduct. Box 1 provides an example on how to develop a trade show intelligence ethics code that lines up with SCIP's ethics code. Tony Wilson developed this example in her chapter published in SCIP's Conference and Trade Show Intelligence book (Calof and Hohoff 2007). (Note: This book has two chapters devoted to ethics and legal aspects of collecting at trade shows, which are well worth reading.)

Then, explain your ethics code to all company employees who attend conferences and trade shows. Remember that everyone going to the event should be collecting information – that's why people go to events. It's not just the responsibility of the CI staff, so make sure that everyone understands your ethical guidelines beforehand.

Remember that the media does not distinguish between CI teams engaging in unethical collection practices and other employees doing the same. To the media, it is simply your company's employees. When you present the ethics code to employees attending an event, they should understand how important it is to follow the code's contents.

Box 1: Align a trade show ethics code with SCIP's ethics code

To continually strive to increase the recognition and respect of the profession.

Ethical behavior by CI practitioners at trade shows and elsewhere directly reflects well on the profession.

To comply with all applicable laws, domestic and international.

Acting ethically obviously goes hand in hand with acting legally.

To accurately disclose all relevant information, including one's identity and organization, prior to all interviews.

Likely the most prevalent ethical dilemma, CI practitioners (and others) must always refrain from misrepresenting themselves or their affiliation during trade shows.

To avoid conflicts of interest in fulfilling one's duties.

Competitive intelligence practitioners should resist the thrill of acquiring that "golden nugget" of competitor information by any means.

To provide honest and realistic recommendations and conclusions in the execution of one's duties.

Ethical collection techniques accommodate honest and realistic results.

To promote this code of ethics within one's company, with third-party contractors and within the entire profession.

An ethics policy and trade show guidelines are of little value if only communicated among members of the competitive intelligence team; they must be shared and emphasized across a company, to anyone who might find himself or herself at a trade show with its relevant opportunities.

To faithfully adhere to and abide by one's company policies, objectives, and guidelines.

As mentioned earlier, competitive intelligence ethics policies for trade shows must be developed in conjunction with and should complement your company's Code of Business Conduct or Corporate Ethics Policy.

(Originally published by Tony Wilson in Conference and Trade Show Intelligence, edited by Calof and Hohhof.)

EASY OR NOT

I mentioned earlier that gathering information at trade shows is easy. Several of the chapters in the foundation's Conference and Trade Show Intelligence book attest to this. However, actually interviewing competitors' employees is often not easy, especially in industries where everyone knows each other or where your competitor has a well-trained intelligence team set up to stop you.

Nevertheless, I have rarely seen a trade show situation where most information specified by the company could not be gathered. So, here's some advice on conducting information collection at events. It should help if you ever find yourself in a situation where you feel tempted to break the ethics codes to collect information.

The more prepared you are for the interview, the higher the probability of success

To what extent have you learned interview techniques like elicitation? Have you done the necessary background research on your information target to interview them effectively? Interview success demands that the target be comfortable with you and to a certain extent trusts you.

Knowing the person's background helps you develop topics to use during the interview and create a comfortable discussion environment. For example, in background research, I have sought to identify areas of commonality that I have with the target and then woven these into the conversation.

Who else might have the information?

If you still find it impossible to obtain the information from a specific person, ask yourself who else might have the needed information and would be easier to interview. At one show, I was asked to validate that a new product was coming from the competitor. I needed to find out when it was coming out and some of the attributes. The competitor's personnel were not forthcoming (and who could blame them?) but there were others who would be aware of this company's new product developments and possible new product launches. Off I went to have an open and frank discussion with several of the competitor's customers and suppliers. This is easy at a trade show because everyone from the industry is there!

I also talked to competitors of the competitors. Remember that you are not the only one watching that company – others are too. As long as you are not discussing their own operations, you may find their company employees eager to talk about the common enemy!

Trade shows are not just about interviewing

You can apply other collection methodologies at trade show events. For example, you can also gather information through simple observation. At one of the shows we had a difficult time gathering information about a potential change in a competitor's strategy, but we did consider that if a change was in fact occurring (the competitor moving into a new product segment), the company's employees would exhibit a different pattern of interactions with others compared to last year's trade show.

We determined that their employees would appear at different workshops, visit different booths, and be seen talking to different people from those in the past. It is very easy to observe patterns of interaction at trade shows.

Learn to Stay Ethical

Many CI practitioners succeed in collecting information at events without resorting to unethical or illegal tactics. In part this is due to all the lessons accumulated over the years on how to interview effectively and other methods of collecting information. Many of these have appeared in this column and in many of SCIP's past publications. So, before you feel the urge to navigate into and past the gray zone, consider that there is always another approach you can use.

“Form”ulating Your Event Intelligence Plan

Competitive Intelligence Magazine, October/December 2010

I often quote in my column the following from Vernon Prior:

> ***“Properly organized, a competent well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances” (Prior 1996).***

When reviewing the columns and articles I have written over the past 12 years for Competitive Intelligence Magazine, I noticed that I had written countless columns with stories about successful event intelligence missions, and articles on how to conduct intelligence in international environments and where to find information (and more) But I really had not fully addressed the issue of planning for event intelligence. Yet, according to Vernon, planning is the key to collecting in three days what otherwise would take a full year!

What is trade show planning all about? Planning is everything from the logistics of where I stay and how I report intelligence developed during the show, to developing profiles of interview targets and role assignments. Since event intelligence requires the efforts of collectors, analyzers, communicators, and coordinators, their activities need to be planned. Planning involves determining who will be where and when. Planning for an event requires much thought and effort.

Forms for Organizing

However, this issue’s column is called “Form”ulating your Event Intelligence Plan, and now is the time to explain this pun. In looking over the contents of the SCIP book, Conference and Trade Show Intelligence, I was struck by the number of authors who had supplied the forms that helped them organize for the event (Calof 2007). As I’ve worked with more intelligence teams, I’ve noticed the many forms that they have developed for project planning, collection, and evaluation.

Over the years, I have seen planning forms and checklists, as well as collection forms, profiles for interview forms, communication checklists and forms, even evaluation forms. Every step of the intelligence process is enhanced by the application of these forms which clearly lay out factors you need to consider if you are to enhance your intelligence efforts. Using forms are key to being organized for event intelligence. Comprehensive checklists ensure completeness in the intelligence effort (the authors of the book certainly demonstrated this). So, this column will start by presenting some of these planning forms. (In the coming months, expect to see more checklists and forms designed to enhance your intelligence efforts.) So, let’s move on to review a few event intelligence forms and checklists.

Details Make the Plan

Most people associate Peter McKenney's sample collection schedule with a successful plan (Table 1). It includes all the events to be covered, which Key Intelligence Topics (KITs) are to be explored at each event, and in subsequent pages of this plan (buy the book if you want more of the plan), and which people are assigned to collect what information. Details like this can contribute significantly to successful event intelligence.

TABLE 1: PETER MCKENNEY SAMPLE COLLECTION SCHEDULE

DAY 1		DAY 2	
FOCUS	**KITS**	**FOCUS**	**KITS**
Meet the expert sessions 7:00 am - 8:00 am	4, 7	Simultaneous sessions 8:00 am – 10:00 am	3, 5, 8
Poster session 1 viewing 9:45 am – 7:30 pm	1-4, 10	Simultaneous sessions 10:30 am – 12:30 pm	1, 4, 7
Educational programs 10:15 am – noon	1, 2, 3	Poster viewing session 2 10:35 am – 6:45 pm	1, 2, 3
Exhibits open Noon – 7:30 pm	All	Exhibits open Noon – 7:30 pm	All
Scientific committee session – abstracts presentations 4:15 pm – 6:00 pm	1, 10	Simultaneous sessions 1:00 pm – 3:00 pm	3, 4, 7
Poster presentations 6:00 pm – 7:30 pm	1-4, 9	Simultaneous sessions 3:15 pm – 5:15 pm	5, 6
Welcome reception in exhibit and poster halls 6:00 pm – 7:30 pm	1-6, 8	Poster session 2 presentations 5:15 pm – 6:45 pm	1-6, 8
		Scholarship fundraising concert	All

Getting to an appropriate level of detail requires carefully formulating the appropriate trade show intelligence objectives. In his comprehensive competitive intelligence show checklist, Brian Soth defines 26 checklist items, divided into five broad categories (Table 2).

Competitor information. Identify which competitors to monitor at the event and the key intelligence topics associated with each, review competitors' websites before the show, and assign members of the competitive intelligence team to cover the information needs at the event. This information will certainly be important when identifying your resource requirements for the event.

Exhibit hall and show logistics. Examine the floor layout and identify (in a sense) the most effective way to move through the hall. Note what times the exhibit hall will be open and where exhibitors will be located, and assign specific employees to collect publicly available information at the appropriate booths.

Sessions. Armed with the intelligence information requirements, review the session agendas and assign individual competitive intelligence staff or extended staff to specific sessions. This step also includes ensuring that each collector has purchased the appropriate badge to attend the sessions.

Gathering places. Identify all the places that information can be gathered, including where the receptions are, where the parties are being held, and so forth. This step is critical in order to obtain the maximum information from events.

Communications plan. Create a detailed communications plan for company employees and the competitive intelligence team. Determine when members of the intelligence team meet during the event, and when debriefs occur. Outline what the final report will look like. These are some of the elements to consider in creating the appropriate plan.

TABLE 2: BRIAN SOTH COMPETITIVE INTELLIGENCE SHOW CHECKLIST

Task	Assigned To	Status
1. Competitor information:		
• Create list of potential competitors to monitor.		
• Refine competitor list.		
• Gather Key Intelligence Topics/Questions (KITs/KIQs).		
• Assign competitors to competitive intelligence team members.		
• Review competitor websites in advance of show.		
• Identify and consult with internal experts who know about individual competitors.		
2. Exhibit hall and show logistics:		
• Review show site.		
• Get list of exhibitors and locations.		
• Acquire exhibit hall layout.		
• Assign company employee to gather publicly available material (e.g., press releases from media room).		
• Examine exhibitor layout for observation points.		
• Gain access to hall before/after hours, if permitted.		
• Find out if photos are ok.		
• Review last year's exhibitor list, compare with this year's.		
3. Sessions:		
• Acquire session agenda.		
• Assign CI staff or extended staff to sessions.		
• Get non-exhibitor registration, or multiple badges (such as exhibitor and conference delegate).		
4. Gathering places:		
• Identify likely gathering places and receptions.		
• Identify private parties.		
• Identify "friendlies."		
5. Communications with company employees and competitive intelligence team:		
• Determine pre-show meeting schedule for competitive intelligence team.		
• Counter-intelligence briefing or memo.		
• Decide how to communicate KITs and KIQs.		
• Schedule daily debriefs.		
• Schedule post-show debrief.		
• Review desired report format.		

Brian Soth included six communication elements in his checklist. His checklist assumes that you have an appropriately sized intelligence team involved in the event. However, many of the checklist elements are also appropriate for solo practitioners.

For The “One-Man Band”

Katherine Hayes created a detailed planning guide for solos which encompasses specific planning details and activities, starting two to three months before the show and ending one week afterwards (see Table 3).

TABLE 3: KATHERINE HAYES: COLLECTORS PLAN BEFORE THE TRADE SHOW

Timeframe	Activity	Deliverable
2-3 months	• Discuss with executives strategic information requirements. • Develop a prioritized list of the required data. • Be flexible as these will change – add/delete as needed. • Pare down list of critical but also keep “wish list.”	• Write up one page plan for executives with expected outcomes. • Include list of data to be collected for final review (expect changes). • Include deliverables timetable and presentation date.
2-3 weeks	• Review the prioritized list and make a plan for data collection. • Identify speakers, attendees, and other to talk to. • Collect photos of and data on individuals to meet. Do you know who you're looking for? • Check to find out who else will be attending. Make plans to meet and get contact names or referrals. • Send emails to new contacts you want to meet (industry experts, speakers, organizers).	• Make your own quarterback plan book – what your schedule will look like, open times, planned meetings. • Have access to a computer to send email alerts, and interview reports – send alerts from your Blackberry. • Prioritize list of persons you want to meet or be introduced to during trade show. • Create cheat sheets for referral (for products or service details you need to remember).
At the trade show: Day 1 Day 2 Day 3	• Work prepared schedule, but allow for opportunities. • As you obtain data, add to database or worksheet. Send an email alert for higher importance material. • Add new contact names and record meeting conversations in database. Review what data still is outstanding. • Debrief yourself every night – distill and analyze the day's information so you're ready for the next day. • Check off what was collected and make a new prioritized list of key data for the next day.	• Raw data formatted, including quickly filled out worksheets, contact database, interview notes, and emails to self. • Reprioritize list based on what was collected. • Build a contact map of people talked to, who they recommended, and those to contact. Work the connections. • Send email to executives and report on progress.
Pre/post events and socials	• Go to first timers gathering, trade show cocktail hour, dinner events, or any other social networking events planned or unplanned. • Use current contacts to get introduced to other contacts. • Start a conversation by volunteering to get them a drink.	• Collect business cards. Write short messages on back to jog memory of the conversation. • Use off-floor places to send email alerts or to write down complex data you need to record immediately. Use restaurants, coffee kiosks, bars, lounges.
1 week post trade show	• Take data and analyze before it becomes stale. • Create on page critical need reports and send to appropriate executives. • Log extraneous data collected during trade show. Forward to appropriate personnel in the company. • Do your expense report. • Create a PowerPoint presentation for upper management. Include major data and analysis at the high level, and your ideas about what the competitor is doing. • Document what worked and what did not work during the trade show. Include techniques, technology, reporting mechanisms, most valuable events. • Keep in touch with individuals you built a relationship with by email or phone.	• Write one detailed report of everything obtained during the trade show. Include scenarios, implications, future expectation of competitors. • Create one page critical needs reports based on pre-plan requirements. • Report detailed budget of expenses and costs associated with trade show CI. • Document impact of CI collected and used over the course of the year.

A key message arising from Katherine's checklist is that planning must also include activities conducted after the show, including documenting what worked and did not work during the show, and keeping in touch with individuals you met at the show who can be critical to your organization's intelligence efforts in the future.

Katherine's plans specify when the activities need to be performed, what the specific activity is, and which deliverable is associated with it. In all, she identifies 24 separate planning activities associated with creating a successful event intelligence plan.

SUMMARY

This column provided readers with three checklists and guides for developing comprehensive event intelligence plans. It showed you the range of activities that need to be accomplished if your event program is to succeed.

Let this be a starting point for your own event intelligence efforts. Modify the guides to include additional elements that are important to your organization and take out those steps not appropriate to the specific event that you attend. Use these and then develop your own forms and checklists to enhance your planning efforts.

In the coming issues, I will present additional forms that I and others have found useful in the establishment of event intelligence programs, and even some general intelligence forms.

So, it's time for you to "form"ulate your event intelligence plans.

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The SCIP Conference: How Intelligent Were You?

Competitive Intelligence Magazine, July/August 2005

My first trade show intelligence article started off with a quote from a past SCIP publication dealing with trade shows:

> ***"Properly organized, a competent well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances" (Vernon, 1996).***

Since that time, much has been written about the value of trade show events for developing intelligence, and SCIP members have continued to practice and develop world-class trade show intelligence methods. In fact, a study is currently under way involving two prominent SCIP members, Kent Potter and John Prescott. (More will be reported in this column as it develops.)

EVENT INTELLIGENCE

This new column will provide practitioners with ideas to enhance their event intelligence programs. In the coming columns, I will present cases, tools, and concepts. Some columns will focus on my lessons and experiences, and others will have members from SCIP sharing their experiences, both good and bad.

Astute readers will note that the title of this column relates to event intelligence and not simply trade show intelligence. Why? Because the techniques talked about over the years can be applied not only to trade shows but also to conferences, and in fact any other event. So, let's start this first column off by focusing on the experts in trade show intelligence – SCIP members – and an appropriate venue for the intelligence process – SCIP05 Chicago.

SCIP05 INTELLIGENCE ENVIRONMENT

SCIP05 provided an extraordinary vehicle for intelligence. It had easily over 100 separate events (workshops, parties, presentations), and over 1000 participants, and exhibitor booths. SCIP05 provided an opportunity to:

- develop contacts for future competitive intelligence (experts in the field);
- identify ways to improve your organization's intelligence practices;
- figure out what customers and competitors were up to, and much, much more.

In other words, SCIP05 was an intelligence-rich environment. It was so successful that SCIP online referred to the event in the following way: "With many attendees calling it 'the best SCIP conference yet', SCIP05 was a tremendous success… nearly 1200 attendees had a great time while gaining valuable information." But did members truly take advantage of the opportunities created by this event?

With so many activities and so many people at SCIP05, the opportunities are incredible but only through the proper use of event intelligence techniques can they be maximized. One of my objectives at SCIP05 was to see the extent to which the CI professionals were organized for this opportunity. So, at SCIP05 I went through the crowd in a very unscientific manner, and asked delegates questions designed to identify whether they were using event intelligence practices for the event.

From my perspective, the unique opportunity was that the people at the event were intelligence professionals. There were many aspects of intelligence that could be examined at SCIP05. I could observe how members collected, analyzed, and communicated information, and also determine what processes they employed for coordination at the show. Since this is my first column, it only makes sense to start at the first step in the intelligence process – planning. Future columns will look at the other elements of the intelligence wheel for event intelligence success.

PLANNING FOR THE EVENT – HOW BROADLY DID YOU PLAN?

While there is a need to balance the flexibility of being able to take advantage of opportunities that are created by having planned activities, you also need a certain amount of planning to maximize the intelligence opportunities available at conferences.

With all the activities and people at the event, proper planning suggests that at some point prior to the event, you:

- identify key intelligence objectives and topics;
- look over the opportunities provided by the conference;
- compare it to intelligence objectives in your organization;
- identify which sessions you should go to, who you should talk to, and what exhibitors to visit;
- prepare for interviews with the people you plan to talk to (for example, profile them) or make appropriate plans for the sessions you will attend.

So, the first step is to identify intelligence objectives, match them to sources available at the show, and plan how to best collect the information from the sources.

WHEN TO START PLANNING

When should planning start? Some say six months, others say a few months before the event.

For SCIP05, the first question I asked was: When did you decide which sessions to attend? I am providing a few of the responses in the form of a scale ranging from 'best planning' to 'better luck next time' (see Table 2).

Where do you fit on the scale?

The dominant answer was “at the event itself”. OK, so many were not prepared for the sessions. No big deal, as you have the presentation slides on CD.

WHO’S PLAN?

Past articles have pointed out that event intelligence plans should be developed to support senior management’s intelligence needs. This should also be done with other objectives in mind, including having fun, personal learning, and other organizational intelligence needs. This is why I created the CI event planning chart (see Table 1).

The idea behind “Whose plan?” was that conceptually your plan should be created based on discussions with individuals in the organization who could benefit from the intelligence opportunities at the event. For SCIP05, I asked attendees who they discussed the plan with. Table 3 provides a few of the responses, but in general the dominant answer was: What plan? A few participants did indicate that their organizations required them to indicate what their objectives were at the show before they could register for it.

TABLE 1: CI EVENT PLANNING CHART

	For CI purposes	For personal development	For future CI	For fun
Workshops				
Meeting people				
Walking the floor				
Staffing the booth				
Parties				

TABLE 2: DECIDING WHAT SESSIONS TO ATTEND

Best planning	Better luck next time
When the schedule of events was posted (several months before the event).	I will decide tomorrow what sessions to attend. There was a schedule online? When and where?

TABLE 3: WHO HAD INPUT INTO THE PLAN?

Best planning	Better luck next time
I talked to my senior management about what we could get at SCIP05. I met with my team to discuss . . . as they could not go to SCIP05.	What plan? It was just me.

PLANNING TO MEET PEOPLE

Perhaps the best thing about the SCIP conference is the people you meet. For years I have told people that what makes the conference valuable is the ability to talk to leading experts in the field. So, how prepared were you to meet people? Table 4 contains the scale I developed based on the responses.

I am still getting emails from people who had hoped they would bump into me during the event. It would have been easy for them to email me before the event and ask if we could get together.

Another area of planning and coordination is who you plan and work with at the event. Past articles on trade show intelligence talked about working with other colleagues who also attended the event. Other potential collaboration can be with suppliers, customers, regulators, and others who would want to see your organization do well.

This event intelligence potential led me to ask delegates if they were working with others. See where you rank in the continuum of answers (see Table 5).

TABLE 4: PREPARING TO MEET PEOPLE

Best planning	Better luck next time
Months before the event I contacted people I wanted to meet and made a schedule of meetings.	I was hoping I would bump into you!

TABLE 5: WORKING WITH OTHERS

Best planning	Better luck next time
My colleague and I decided who would attend which sessions; we are working together.	I didn’t realize they (the other colleague) was going to be at the conference.

PLANNING AHEAD

SCIP conferences present unique opportunities, but only if you plan properly for them. For next year, think about how far in advance you are going to plan and also how deep the plan will be. (Plan depth refers to the number of areas covered by the plan.)

SCIP conferences and workshops provide an opportunity to practice event planning for attending presentations, but there are also workshops, exhibitors, networking receptions, and delegates to meet with. All of these should be examined as part of your event plan, as each has the potential to provide you with the valuable information required for your intelligence efforts.

For those of you who are now frustrated because you realize that you lost valuable opportunities for conducting event intelligence at SCIP05, fear not. There is always SCIP06 and SCIP Europe 05 as opportunities to maximize the intelligence available from an intelligence conference. To quote perhaps the most experienced and seasoned competitive intelligence professional at the conference who said, upon observing some of the best practices pointed out in this column, "I am going to have to do that next year."

By the way, if you are wondering where you can get valuable material to learn how to plan for event intelligence, look no further than SCIP's own publications. A few of the articles on this subject are listed below, including one that could have been of great help for SCIP05, called "Getting the most out of SCIP03"!!

Good luck with your event intelligence program, and I hope that this column provides you with ideas to help make your events more intelligent.

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Collecting Information at Events: Tips From Competitive Intelligence's Best Collectors

Competitive Intelligence Magazine, May 2020

SCIP, as part of its increasing focus on providing a value proposition for members, is now making available, for free, several of its classic competitive intelligence guidebooks.

The guidebooks include *Starting a Competitive Intelligence Function*, *Navigating the Gray Zone*, *Competitive Technical Intelligence*, *Market & Competitive Intelligence Anthology*, and (the topic of this column) *Trade Show & Event Intelligence Best Practices*. The 200+ page guidebook brings together some of the top competitive intelligence practitioners who share their insights on how to maximize trade show intelligence opportunities. The book provides readers with tips on planning (with examples of event intelligence forms and plans) and analysis at events, case studies, tips on counterintelligence at events, and of course great tips on how to gather information at events. This column presents some of the collection and networking tips from the guidebook and I hope will encourage SCIP members to download this free resource to bolster their event intelligence efforts.

Trade shows and other events, as I have written in countless columns, are the best opportunities you will ever have for ethically collecting the valuable information you need for your intelligence efforts. It is no wonder that this is one of the key topics on the SCIP website and the subject of countless webinars.

Collection opportunities abound at trade shows, thanks to a broad range of activities occurring taking place at these events and the fact that the focus of events is exchanging information. I have often said that they are called trade "shows," not trade "protects". Not surprisingly, the *Trade Show & Event Intelligence Best Practices* guidebook has a lot of advice on how to gather information at events. This advice is provided by well-recognized CI experts and is sure to help everyone improve their event intelligence collection and networking skills.

KEY INSIGHTS ON MINING CONFERENCE MATERIALS

The *Trade Show & Event Intelligence Best Practices* guidebook has several chapters that focus specifically on how to collect information at events. Alison Bourey's chapter, "Mining Conference Materials – Ways to Strike Gold with Secondary Sources", offers readers guidance on how to collect information from secondary sources. I have included her list of tips on how to mine this information in Table #1.

Table 1: Types of information to mine from conference materials

Agenda	Topics and speakers provide insights into: • The hot topics in the marketplace; • The opinion leaders and their positions; • The experts who are taking a stand and their hot-button issues; • New presenters who are emerging opinion leaders.
Exhibit area layout and exhibitor listings	Indicate the marketing budgets for the competition. May also signal reduction in support for a particular product line if it changes over time.
Attendee list (registrants, vendors)	Enables you to mine attendees post conference for primary research contacts and how to contact them. Can serve as a snapshot of the audience and reach of the conference for future planning: • Developing or declining conference in gross size and quality of attendees; • Geographic or corporate-level bias of the conference; proportion of attendees coming from within two hours of the conference; • The quality and size of the exhibitors and what types they are.
Disclosure statements	Help you track relationships with competitors.
Posters, handouts, and educational material	Essential for understanding competitors' new product development direction. May also lead to new opinion leaders or spokespeople for your competition to add to your primary research database.
Press releases	Clarify specifics of the competitor's "noise" that is likely to turn up in the press over the next month, giving you time to prepare. Also may designate the public relations firm or the advertising agency for the competition.
Post-conference reports	Gauge the utility of the event from statistics and reports obtained from the conference organizers. Find out how many attended and where they were from. Develop return on investment for the conference and its materials. Would purchasing proceedings (book, CD, DVD) be a better investment? Archive and make the material easily accessible. Alert your teams to what you have and where to find it easily.

KEY INSIGHTS ON INTERVIEWING

Anne Barron's chapter, "On-Site Tools and Techniques for Primary Information Gathering", provides tips not only on how to conduct an interview but how to prepare for an interview. Anne writes at the beginning of her chapter:

> ***"To effectively coordinate this effort, you first need to be organized and prepared before the conference or trade show. Think about the equipment needed to capture the information you are gathering consistently and effectively. Think about your appearance, functionality of your clothing, and what tools can help simplify these tasks."***

Anne has valuable interviewing tips organized around the different event collection venues: exhibit hall, booths, presentations, poster sessions, media rooms, social/networking activities, and hotels/restaurants/conference transportation. For interviewing at poster sessions, Anne recommends:

> ***"Whether you wish to clarify the author's research or have a detailed discussion, plan your questions and time your visit accordingly. In most cases, the authors tell you everything about their research — after all, that is the purpose of the poster session. They may be anxious to talk to someone instead of standing there by themselves."***

For interviewing at booths (including competitors' booths), based on her years of experience, Anne provides reassuring tips regarding most of the booth personnel you will encounter:

> ***"In the booth environment, most exhibitors focus on selling, which means they need to tell all individuals who approach the booth their story and answer their questions."***

According to Anne, "Here's what you need to understand about 85 percent of booth personnel":

Attributes of the Vast Majority of Booth Personnel

- They do not want to be there.
- They have never been trained to interact with visitors or to identify competitors visiting the booth.
- They are uncomfortable in this environment.
- Many are junior or new staff anxious to demonstrate their knowledge of their new employer's business.
- Most are marketing or sales staff. They want to tell you their story. They are waiting to tell you their story. They are dying to tell you their story. They want to sell to you.
- The majority of booth staff will ask, "May I help you?" Simply say, "No thanks, I'm just looking," and go about your business, or answer "Yes," and state your question.

Anne also provides great tips on how to dress for trade show intelligence collection success, including the advantages and disadvantages of the different kinds of "badges" (exhibitor, delegate and exhibit hall-only badge) when collecting information.

John Nolan, a noted interview expert, penned a chapter titled "Elicitation – A Critical Part of Your Trade Show Tool Kit". John's chapter provides tips on how to elicit at events and includes examples of scripts/scenarios, tips on best times to conduct interviews, and even ideas on where to conduct these interviews. If you want to know what elicitation is, download the guidebook and read this chapter.

Finally, Krysta Davis's chapter, "The Human Element of Intelligence Gathering at Trade Shows and Conventions", provides readers with advice on many aspects of information collection from primary sources. Here is just one of the many interviewing gems she shares:

> ***"Try to keep the conversational flow steady. Don't interrupt people when they say something that you find unique, important, or even exciting. You can always return to the topic later in the conversation if you need additional clarification… Be humble. No one will talk to you if they feel threatened by you. When asking for someone's opinion on a subject, don't feel that you have to assert your own opinion as well. You are there to learn, and you gain more information by making others feel that they are really helping you out by talking to you."***

CHAPTERS WITH ADDITIONAL COLLECTION TIPS

Several of the chapters in the book, while focusing on other aspects of event intelligence, also provide collection tips. For example, noted CI consultant JP Ratazak's chapter, "Engineering Engineers: How to Develop a Trade Show Intelligence Process", provides readers with insights from his years of TSI (Trade Show Intelligence) experience. While not focused on interviewing (the chapter is far broader), he does provide readers with 10 interviewing tips. I have included these below.

I have used J.P's valuable interview tips in several of my intelligence programs around the world, asking participants which tips would work in their industry and their country, which would not work, and then to add a few more. Interestingly, there is definitely an international/cultural overlay to the reaction of my groups to these tips. Some cultures like flattery, others do not. I was even told in one country that flattery works well but only if the target knows you. If they do not know you, then any flattery (even if it is sincere) will cause the target to distrust you.

I had one interesting cultural experience with the use of silence – where the person being interviewed generally becomes uncomfortable with silence and fills in the space with additional information. It works well in North America but when I first tried it in Asia, the target actually saw it as a valuable Zen moment in which we looked at each other in silence for several minutes.

International aspects of collection at trade shows were also noted by Arjan Singh, Jodie Peake, and Leonard Fuld in their chapter, "How to Execute a Trade Show Intelligence Plan". The authors also had great advice on unplanned collection:

> ***"Unplanned and informal opportunities are not as obvious to plan, but they often yield the best results. Coach your team members to recognize and take advantage of these moments. The best intelligence-gathering opportunities happen when you least expect them, and you must be ready… Team members should remain as fresh and alert as possible, appear open and friendly, 'tune in' to conversations and activities going on around them, and smile. A person who appears friendly is much more approachable, and you never know who may approach you next. These unplanned opportunities can happen on the airplane or at the airport before an event, during elevator conversation, while standing in line for lunch, having drinks at the bar — really anywhere."***

Box 1: Top 10 elicitation tips – JP Ratazak

1. ***You already have great connections.*** You probably know someone who works at [Competitor A], know a vendor who sells to them, etc. These make for some excellent conversation starters.

2. ***Direct questions can be a conversation killer.*** Questions are memorable and can draw direct attention to the information you're obviously interested in obtaining. They give people time to ponder whether they should be telling you something.

3. ***Information that is unknown is more valuable than information that is known.*** Never act surprised at what you hear. Someone will be more comfortable with providing you information they believe is already known, or at least figured.

4. ***Avoid words like*** competitive research, market research, proprietary, confidential, legal.

5. ***Pay attention to the nonverbal messages.*** People have a microsecond-long reaction to situations before they can mask their feelings. Showing the tongue, even just the tip, usually is an unconscious sign of disagreement. When someone is about to say something, they don't want to say or are uncomfortable saying, they tend to cover their mouths.

6. ***Flattery works wonders.*** Whether you're commenting on their product or their company polo shirt, people respond well to flattery. Another silent way to do this is to mirror their body language.

7. ***Use pauses and repeated words to get more detail.*** . If someone says "well, we're expanding our markets in Asia." Simply say "Asia." Then wait. Or say nothing at all and let them fill the silence.

8. ***Be prepared.*** Look over your information needs list before you walk to their booth or know you'll be engaging them in conversation.

9. ***Just because you remember your information needs doesn't mean you should go straight over and ask them.*** If 5 people from [insert Competitor A] came up to you and commented on a very specific issue, that would raise your suspicion level. Elicit responsibly.

10. ***Do your collection ethically.*** There's no need to misrepresent yourself. People are at this trade show to talk about their company.

And one more: ***Write things down.*** You don't have to do it while you're in the middle of a conversation, but do it before you forget. This will also help when you are trying to compile the results later on.

Ellen Naylor's chapter, "Going Solo: Sharpen Your Trade Show Collection Skills", provides insights into how to run a TSI mission when you are a team of one. While the chapter is not focused on collecting information, she has some valuable tips regarding interviewing technical personnel:

"…technical personnel are more likely to tell you the details of their company's technology, and if you're lucky this might include more about future plans for development. It's usually easy to engage technical people by sympathizing with their technical dilemma (if the demonstration didn't work) or by simply asking them what they do. They can introduce you to other booth personnel, and you have the opportunity to ask the other individuals more questions based on what you've just learned from Mr. or Ms. Technical."

NETWORKING TIPS

In prior columns and in my training programs, I have emphasized using trade shows, conferences and other events to build your network. Making new "friendlies" at events can be the gift that keeps on giving. Two things fuel my advice on using events to make friendlies:

1. Most people are busy at these events. They may not have time to talk to you at great length about your intelligence needs and could well appreciate an approach that says: "I know you are busy; let's get together after the show."

2. Interviewing is an exchange relationship and exchange relationships start with, well, a relationship. Why not use the event to start developing that relationship?

Erik Glitman's chapter, "Build on Show Interactions – Leverage Your Contact Network", reinforces this idea of developing contacts and building your network at trade shows. Erik makes the valuable point:

"Establishing friendly contact during the event is a key activity for successful follow-up. Exchanges of factual information, opinions on where the market is heading, rumors on what different companies are doing, and management shuffles all are part of establishing credibility and reciprocity with your new sources. Don't let your desire for a long-term relationship interfere with your need to get solid competitive intelligence at the event, but don't be so hard-charging at the event that you scare away a new source."

Erik has a great list of follow-up tips that I have included below in Box 2.

CONCLUSION AND GETTING YOU READY FOR FUTURE COLUMNS

If you are properly organized, you can collect more at an event in three days than you could in a year in other circumstances. *Trade Show & Event Intelligence Best Practices* was designed to help you maximize on this opportunity. The guidebook is a free resource available to SCIP members which provides tips from leading CI practitioners on how to maximize your trade show intelligence return on investment, including how to collect information at these events. It is supplemented with a wealth of material on the SCIP website (under the Insights dropdown/Key Topics) under the "Event Intelligence" link, and for those interested in even more interview tips, the "Primary & Secondary Research" link. Each of these resources provides the CI community with tools for maximizing their information collection opportunities.

Box 2: 7 steps to keep communications open after the event – Erik Glitman

- **Remind.** Provide background on who you are, how you met, and what you talked about.
- **Re-evaluate.** Determine how this contact can help you. Should you invest in building a long-term relationship?
- **Reinforce.** Remind them of what you learned and what they gained through your initial interaction.
- **Redirect.** Tell them what is "new" without giving away any key competitive intelligence ("give to get").
- **Reassign.** Give the source a reason to complete a task for you that is not too difficult and is in the public domain.
- **Reassure.** Let the source know that you value their input.
- **Refresh.** Keep the relationship fresh by making a point to meet face to face at other events.

But there are more materials to come! The SCIP approach of bringing together leading experts to write the guidebook got me thinking about bringing together others who had expertise in interviewing and networking. This started with my looking internally at colleagues at the University of Ottawa. I did a search of the professors' biographies and published articles, and talked to various friends. I found that the topic of networking and interviewing was embedded in many faculties.

I was teaching it at Telfer (University of Ottawa Business School). I then found Trevor Tucker at the Department of Communications in the English School who was teaching a course on Non-verbal Communications. Stefanie Haustein from Information Studies was doing research and teaching in social media and social network analysis, while Perry Steckly gave the odd lecture in Networking in the business school and was teaching a course at Carleton University. Then there were researchers from the School of Psychology, the Medical School (interviewing patients is an important area of research), the Law School, Biology, and other (science) departments.

There are many fields that have interviewing and networking as research and teaching topics. The idea is to combine each of our domains' theories, tips and exercises related to interviewing and networking and develop common materials that can be taught to our students and others. Figure 1 represents this approach.

In future columns, I will be sharing some of these developments with you. The first will highlight the work that Perry and I have been doing on interviewing and networking. Perry has combined insights from the Police Sciences with research in Cognitive Psychology, Neuroscience and Biology to create a popular seminar called "Connecting with Sparks". Stay tuned for much more on TSI.

Figure 1: Departments teaching/researching interviewing and networking – University of Ottawa

Working the Floor

Competitive Intelligence Magazine, May/June 2006

All elements of the competitive intelligence process (planning, collection, assessment, communication, management) can be conducted at an event. But the most fun lies in the collection phase.

What methods, tools, and tricks can be used in collection at trade shows? Virtually any topic that has been covered in SCIP publications can be employed at these events. At trade shows, companies have booths, experts give talks, and so forth – to give out information. Compared to other collection opportunities, event collection is probably the easiest, as events are all about providing you (the collector) with information.

The Agriculture Biotechnology Conference (ABIC) provides an interesting example. Like other trade shows, ABIC has the typical booths, parties, and keynote speeches. As a scientific conference, it also has poster sessions and workshops. With hundreds of booths, thousands of delegates, workshops, poster sessions, and keynote addresses, there are many opportunities to collect information.

PRE-EVENT WORK

Pre-event preparation steps focus on several things, including ensuring that at the event, you collect only information that you could not have collected before the event. For example, the event is a lousy time to read product or company brochures that are available on the company's website.

For scientific conferences, it is more effective to obtain a copy of a scientist's paper before the event than to get it at a company table and evaluate it at the event. Make sure that, to the maximum extent possible, you focus on primary sources and that you prepare properly. Even event interviews can be made more effective by researching the target prior to the event.

Scientific conferences normally have poster sessions. Located somewhere off the main floor, this part of the event consists of 15 to 20 posters describing research at various stages of development. Each poster is staffed by the scientist responsible for the research. Scientists like the poster format as it allows them to present research results in an intimate setting with the potential for extensive dialogue.

Preparing for interviews is a key step in any collection process, and it is no different for poster sessions. The first step is obtaining detailed background on the poster author(s) themselves. Since the topic and author(s) of each session are advertised well in advance, do background research and identify the specific expertise of each author:

- Is this their first foray into the area?
- Does it build on their past research?
- Have they had co-authors in the past that you would like to find out more about?

Next, send an email to the presenter asking for a copy of the working paper. If the presenter works at a university, first check the university's website and see if the paper is there. This step also gives you an opportunity to introduce yourself and obtain as much secondary information as possible so that you can spend your time at the event going into greater detail with the scientist. Consider setting up a meeting at the event, or even collect some of the information over the phone.

If you cannot get the paper in advance, then pick it up at the poster session and digitize as much of the poster imagery as possible. When you want to digitize materials or observe interaction patterns at a poster session or a booth, do it when these areas are busy, not when traffic is low. You don't want to engage in conversation with the scientist or booth personnel before you are ready.

Whether you are interviewing at a company booth, poster session, or other occasion, the more background research you can do on the target, the more fruitful the interview will be.

CONDUCTING AN INTERVIEW AT AN EVENT

After reviewing the paper or conducting the requisite background research, you are ready to conduct the interview. Here is where your skills as an interviewer come in handy. SCIP has many workshops devoted to this topic, which I strongly encourage all readers to attend.

Interviewing at a conference is not that difficult, as people are there to talk. Scientists at the poster session want you to know about their research results -- that is why they put in a poster. The company personnel at their booth are there for one purpose: to talk about their company and products. Still, not all interviews at events are instant successes. The following are a few of the problems I have encountered.

I'm Pressed for Time.

People staffing booths or poster sessions are busy and have many people to talk to. If they have read any books on staffing a booth, they have been taught to stream people as potential customers, collaborators, competitors, time wasters, and similar categories. As a result, you may have time to ask your three questions before you are classified and asked to move on.

Learn how to read body language to identify if you are dealing with hurried people who are trying to move you on. How do you handle this situation? Try to connect at a professional or personal level, and you may find that they want to continue beyond the usual three questions and get down to ideas. Have tradable information – that is, information that you are sure they need for their job. Another approach is to schedule to meet them later.

Finally, consider coming back later to ask another three questions. You'd be surprised how well this approach works. Sometimes it allows you to approach people at a more convenient time, and sometimes they simply don't remember that they have already talked to you.

If you pick your interview time correctly, you could have a long and rich conversation. At one event I attended, I approached targets on the last day of the show when few people were in the exhibition hall; the booth personnel were so lonely that they kept extending the conversation.

I Don't Like You.

No matter how skilled you are, sometimes you are just the wrong person to conduct the interview. At one event I tried to elicit information about a new technology from an executive but was not getting anywhere. The clue that perhaps someone else should do the interview was the lack of eye contact.

Now, lack of eye contact can mean many things: that the subject is nervous, time-constrained, or much more. But I noticed that he was making eye contact with others. Whenever any well-dressed, gray-haired man walked by, he would look at that person. Once I identified this propensity, I realized it was time to have someone else conduct the interview who met his preferred criteria. I approached one of my friends who happened to be at the show. He was well dressed and slightly gray. I asked him to conduct the interview and it was an enormous success.

I Don't Want to Talk About That/I Am a Person of Few Words.

Sometimes, even at an event where people are supposed to talk, they feel that you are asking for sensitive information or they simply are not the type to talk. Here I have resorted to many standard techniques, including elicitation, asking who else I could talk to, or asking why the topic is sensitive. I have even tried coming back later to re-ask the question (maybe they will feel more talkative later).

To minimize the probability of trying to interview someone who doesn't want to talk, observe the targets for a little while to get a sense of their style. As others approach them at the booth or the poster session, are they talkative or reserved? Do they try to end the conversation quickly, or do they have a more friendly approach? Also, try to overhear some of the conversations to identify the extent to which the target goes into detail versus superficial conversation.

OBSERVATION AT THE EVENT

Interviewing is not the only method of collecting information at an event. You can also obtain a wealth of information from direct observation. Here's an example from a food trade show in Asia. The primary collection focus for this trade show was to identify how branding of beef was being done in Japan. My client was considering emphasizing the safety and security of its beef. The proposed messaging would be that the beef coming out of its facility was healthy, cattle were fed natural products, and all cuts of beef could be traceable to specific cattle -- safety, security, and traceability. My job at this conference was to identify whether this approach made sense.

Interviews did form part of the methodology. However, a very simple approach for collection lay in direct observation of two sources: booths and conference sessions.

BOOTHS

Identifying branding at booths is very easy and can be done in a scientific way. My approach included random selection of booths from companies that sell beef. I gathered all their marketing materials, digitized signage, and then identified from the materials how their beef was being branded.

After processing this information, I conducted interviews with company personnel at the booth to confirm that this in fact was the method of branding and why the branding was being done that way. Not all booth content would be digitized and not all digitized booths would result in interviews, but I needed to develop and justify a sampling methodology.

CONFERENCE SESSIONS

Trade shows feature a variety of workshops, keynote speeches, and other public events. At the Asia food show, I reviewed the list of these events and identified sessions at which branding and beef was or could become a topic. At these sessions I would record comments concerning branding and listen to the questions industry participants were asking about branding.

By listening to their questions, I could discern what their thinking was around branding, what changes they were contemplating, and what issues they were confronting. For example, if one of the leading beef importers in Japan asked the speaker, “Is there any work that you are aware of that is pointing to additional medical benefits of beef?” followed by “Is the rate of heart disease associated with beef as high as is being reported in the popular media?”, I could reasonably start to conclude that health benefits could become an important branding element in Japan’s beef market. This makes sense as health claims are a normal branding element for many other products in the Japanese food market.

Direct observation is a great method for collection, as it is unobtrusive. It is also free from collection bias in that collectors are told exactly what to collect and do not provide any interpretation of the data. They simply report what they saw and produce the digitized images or brochures to back it up. In interviewing, bias can occur as the collector may not be able to remember accurately everything that was said in the interview, especially if the interview was not tape recorded.

What did I learn from observation at the Asian food show? Virtually everyone had safety and security as part of their brands. If the organization I was representing followed the same approach, it would be indistinguishable from the rest of the competition. It needed something else to set it apart. Based on the observations from the workshops, my sense was that health claims could be the second part of the branding message. This was later confirmed in direct interviews.

In short, collection at events is easy, and there is a wealth of opportunities. The key, however, is to be prepared.

Digital Matchmaking and Picking up Insights from Others at Events

Competitive Intelligence Magazine, Summer 2019

It's been a rather interesting few months for me in the event intelligence program, getting several companies ready for two defense industry shows (DSEI and CANSEC) and another group ready for Startupfest, a conference focusing on new ventures, venture capital, and business expansion.

As the event intelligence training program proceeded, the companies' information needs became far more focused, but in many cases concerns around how to find the right people to talk to and how to talk to these people grew. This concern around networking and interviewing at events is normal. When I led a session on event intelligence at a recent SCIP conference, the number 1 topic of discussion was how to interview at events, including competitors.

Therefore, this column uses my Startupfest, DSEI, and CANSEC experience to look at networking and interviewing at events. I will give a few information collection stories from the events, interspersed with several tips on how to maximize information collection at events.

"People are going to shows in the hopes of connecting to the right people, and events are using technology to enable this."

FINDING PEOPLE TO TALK TO

Technology wise, events are changing. For example, I've previously written about the use of Twitter at events, such as using those who are tweeting to ask questions on your behalf and using people's tweets as a source of information for shows. But what I saw at Startupfest and DSEI showed me how event technology is being developed to help you meet the right people. Event managers are getting it. People are going to shows in the hopes of connecting with the right people and events are using technology to enable this.

In the case of Startupfest it was a program called Braindate, and for DSEI it was called BE Link (part of meetings program.) In both cases, the idea is that you fill out a profile on yourself and what kind of people you're looking for, and the system matches you up to people of interest. (Figure 1 is the DSEI program with matches they found for me and Figure 2 is Braindate graphics, including the Braindate meeting area). Each of these systems also lets you search the list of those registered for the show (and who have filled out profile forms) to identify potential "dates".

Figure 1: Meetings programme at DESI

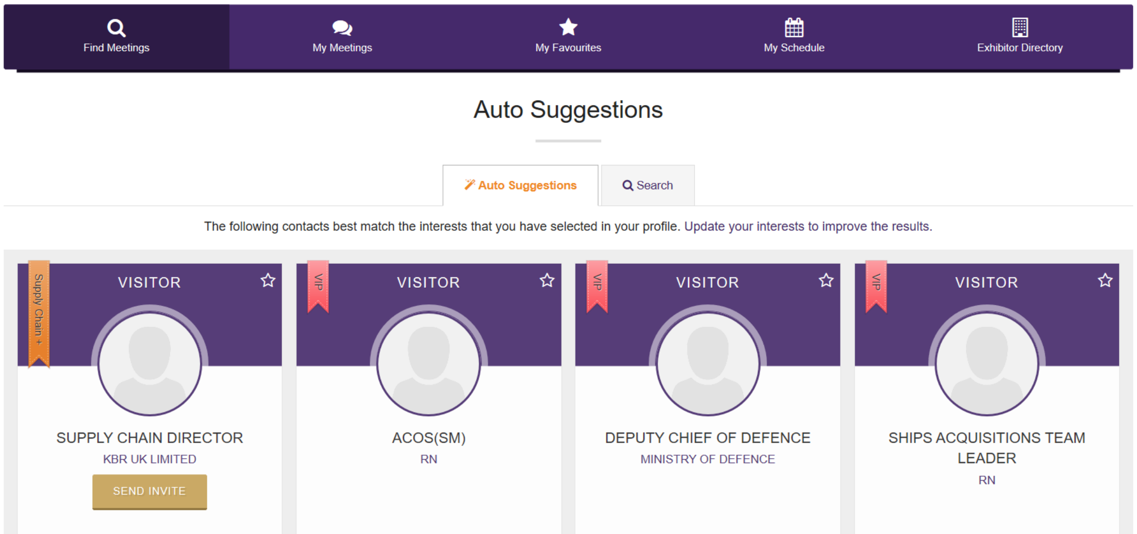


Figure 2: Braindate at Startupfest

Startupfest 2019 is proud to present Braindate!

You come to Startupfest to meet great people and learn about new things. But how do you spark those meaningful conversations? **It all starts with a braindate.**

Braindates are about sharing knowledge. They are one-on-one or group conversations that you book with other participants while you're at Startupfest.

What is a braindate?

Braindate is an innovative platform that helps you find the right people to meet one-on-one to share knowledge and learn from the right participants. Braindates offer the opportunity to learn from your fellow participants at Startupfest about the subjects that are most pertinent to you. Want to hear someone's experience about pitching to investors? Exchange best practices about marketing strategy? Book a braindate with the entrepreneurs at Startupfest to start learning with intention!

For DSEI, I have been matched to visitors and exhibitors, including the Deputy Chief of Defence whom I can now reach out to and it is not truly a cold call. For Startupfest, everyone that I had trained met with the "right" people for their information needs. Information on distribution, competitors, potential customers – you name it – was exchanged during these Braindates, but only if you had the proper "matchups".

FINDING THE RIGHT PEOPLE TO TALK TO

I talked to all my "students" (the program participants) each day of the conference and trade show to find out how the event was going, to provide coaching, advice and encouragement. One of the first of my program participants to do a Braindate lamented how useless it was. It turned out that the person they were meeting with only wanted free samples. It was not the expert she had hoped it would be. Why did this happen?

For one, my "student's" profile in Braindate lacked depth and specificity. A second problem was that she did not check any information about the Braindate – not the "date's" LinkedIn profile, nor their company's website – nothing that would enable a proper profile of the potential match. Needless to say, after I pointed this out, the program participant looked very carefully at those whom she now had Braindates with, cancelled some and made others, which resulted in a very successful show, intelligence-wise.

CI has a lot of advice for those developing these profiles and even on how to search for the most appropriate person to meet with. If you are trying to attract the "right person" who fits with your intelligence needs, CI can advise you on the words to use that will attract the identified targets. CI can help your colleague fill out their profiles to attract the people who would be interested in providing the intelligence they need in order to make future sales. This is classic CI profiling and identifying appropriate personas. CI also knows about background checking and developing profiles on the people at the event whom you may want to meet with to maximize opportunities. Furthermore, as a CI practitioner (those who are reading this article), if you're going to the event, then you need to think about who you want to connect with and how to lay out your profile so that it's easy for the right people to connect with you. With more and more shows providing tools to search registrant profiles, using the right words in your own profile to attract the right people is critical.

GETTING TO THE RIGHT PERSON – GETTING INFORMATION

In my event intelligence program, participants develop plans for the event that they are being trained to go to. They prepare a list of the information needs and go through the available information about the event, including speakers, exhibitors, panels, and so forth. For both DSEI and Startupfest, they also search the profiles database and then match the information needs to the people at the event.

As mentioned earlier, they are typically very nervous about interviewing, so I try to instill confidence in participants by telling them that it's called a trade "show", not trade "protect". I tell them that people at events are there to talk, especially those who are keynoters (they answer questions). I have another piece of advice: that the person they want to talk to they have never talked to before. So, at worst (meaning the target will not talk), then they are no worse off (didn't talk to them before and are not talking to them now). I also tell my participants that they should not be nervous as they have done all the background work – they know whom they want to interview, they have profiled them, and have a list of questions. They are ready to interview, and they are prepared. They should be confident. They have even received a bit of interview training.

Yet, despite all of this and all participants having detailed plans, I felt that when I was at the event with them it was like I was pushing the little birdies out of the nest. They were nervous about going out and interviewing the targets. They didn't want to leave the lounge area at the event where we had set up our war room.

One of my participants at Startupfest had identified a keynote speaker as a person of interest; a kind of competitor or possibly a distributor for her. This event intelligence student identified three speaking event opportunities that her target would be at and waited patiently to greet her as she came off the stage. She was nervous, but I told her not to be as the target was a keynoter and should want to answer questions. We did some background checking; the target had done many interviews and was very proud of her success. My student was still nervous and it didn't help that during the first two opportunities, the target left through the back of the stage, avoiding people.

Nervous but not deterred, my event intelligence student was ready for the third opportunity. She positioned herself close to the back of the stage. When she saw the target leaving with luggage in hand, she approached her, almost tackling her. She introduced herself and described how she was a start-up business in the keynoter's industry and wanted to learn from her. The keynoter spent a few minutes speaking with her, answered some of her questions (taken from the intelligence plan) and then gave her a personal email address to continue the discussion. She also sent a message to one of her senior management employees to help my event intelligence student out.

Being prepared with focused questions tied into intelligence plans, profiling the person to interview and developing a contingency plan to meet the target all contributed to the interview's success. That said, it started with a lot of nervousness and a concern about leaving our group area to do the interview, and a lot of reluctance to even try.

BUMPING INTO PEOPLE

Startupfest, CANSEC and DSEI provide great opportunities for random discussions, as any show does. I was standing in a long line at CANSEC to get food and started up a conversation with the person in front of me and his colleagues who were with him. I saw from his badge that he came from a company that I wanted to connect with for an intelligence project. Despite being a random run-in, it was a successful conversation, thanks to my event intelligence plan. I was prepared, focused, and friendly. But key for me was that I also had a few check questions to make sure that the person I was talking to, had the necessary expertise and status in the organization for my intelligence purposes. These check questions are crucial and once again tie into the idea of profiling and personas. It helped that I wasn't nervous and I'm a friendly person. I was also able to give him a few connections based on what he said he was at the show for (call this networking 101), which made him want to help me more.

READING BODY LANGUAGE – PUTTING INFORMATION INTO CONTEXT

Let me tell you another story from Startupfest. The event provides many opportunities to pitch your ideas to people, both in formal pitch sessions and also casually at booths and other places. Many experts whom you bump into or seek out proactively can provide information on how to get venture capital, what's happening in the industry, and so forth. Figure 3 depicts one of those opportunities. It was a session called pitching to the bubbies – a session in which you have a few minutes to present your ideas and then the questions come.

I trained my group that when they talk to people, watch their body language, see when they get excited, what makes them concerned, and so forth. I tell them to make a note of all the questions they're asked. What I didn't tell them was to also figure out who is asking the questions, their background, and the basis of their expertise. Some questions and comments matter and others don't, depending on the expertise of the person speaking. This ties into competitive intelligence and target identification.

Figure 3: Pitch meetings at Startupfest

Here is the Startupfest story. One of the program participants ran a vegan company with some great-tasting spreads, a vegan cheese replacement. After what she thought was a great pitch, she got only one question: "Does it really melt?" She was devastated. "I thought I was doing well. The body language was great and then only one question, and on something as minor as melting point, and I had mentioned it during my pitch."

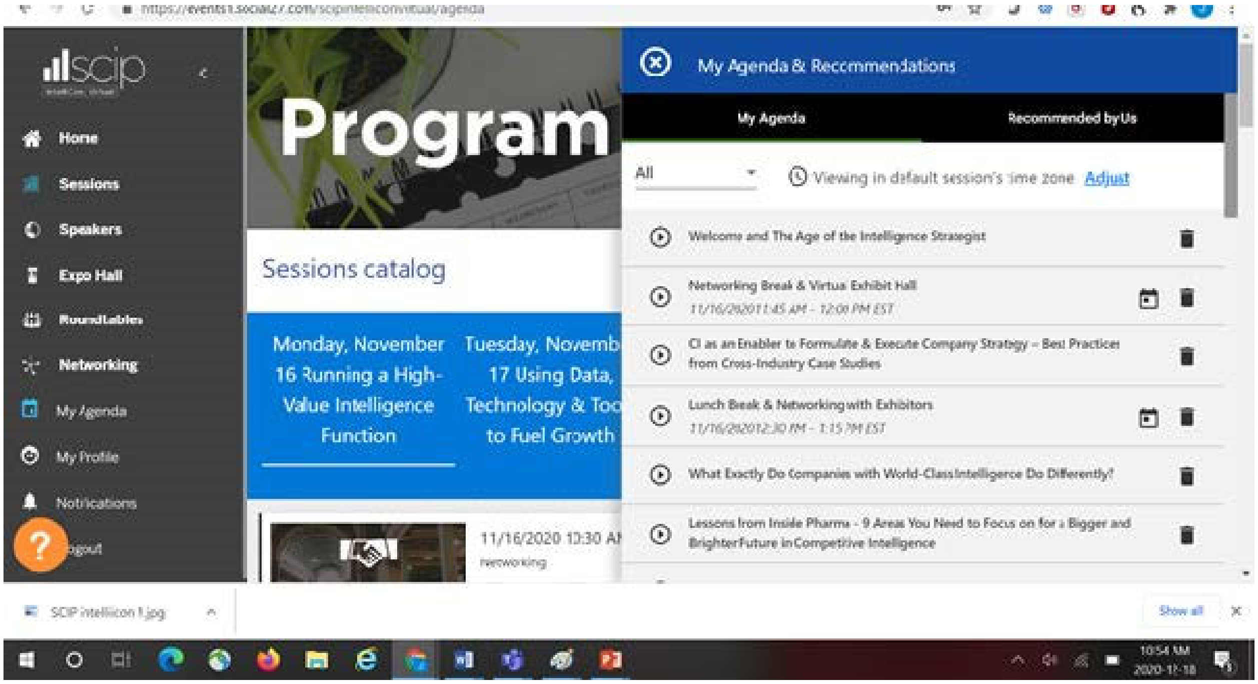
I put that one question into a very positive CI perspective. The "bubbies" that she presented to had a lot of experience with start-ups, but they were also "bubbies" – grandmothers (you can see their picture in Figure 3). As I explained to the program participant, they represented some of Canada's diversity: some were Muslim and some were Jewish. They recognized the importance of Halal and Kosher, and that a vegan product that can truly melt has a huge opportunity in these markets (since Kosher forbids mixing dairy and meat). Rather than a disappointing question, it was a valuable insight about a large market that the vegan company founder was previously unaware of. Knowing who you are getting information from, their expertise, and their perspective are important in the collection process.

CONCLUSION

Interviewing isn't that difficult if you're prepared. Have clear information needs and take advantage of available technologies, like these match-making programs that are becoming more popular at conferences and trade shows, to find the right people to interview. But this can only happen if you know what you're looking for and how to both design your profile and select appropriate keywords to make the match. It's about doing the work to profile those you want to interview so that you can develop an appropriate interview approach.

As the keynote story showed us, you need to have a backup plan if it's a target of high importance. As this column has shown, no matter how prepared you are, random opportunities arise. For these, a profile really can't be done on the fly (although elements can be inferred by body language). However, having a few check questions to validate the person's expertise (and degree of importance for your intelligence program) can make all the difference.

This column has presented you with several stories of interviewing success arising largely from a group of newbies. But they were prepared and they succeeded. Remember, conferences, trade shows, and events are gathering places for people who want to talk; if you are prepared, success is likely to follow. I hope the stories and tips presented in this column help you experience even greater intelligence collection success.



Section 3:

How Things Have Changed in Event Intelligence

Communications and Trade Shows

Competitive Intelligence Magazine, November/December 2008

The expression so often heard in competitive intelligence discussions is “actionable intelligence”. What’s the point of planning, gathering and assessing it if it is never “actioned”? In my experience, one of the primary reasons that intelligence is not used is how it is communicated. As with everything else in business, communication is integral. This column focuses on communication for trade show intelligence.

It would be easy to simply focus on how important it is to communicate the intelligence developed at trade shows. In fact, I could build on past CIM articles by Koretsky (2007), Desouzza (2003), and Fiora (2005) and write about how to present the results, what results should be presented, who should present them, to whom, when, etc.

To be sure, these elements are important, as the way you present the message has much to do with how it is received. However, this column, similar to the one last year by Ellen Naylor (2007), takes the broader perspective of demonstrating:

- How communication has a role pre-show, at the show and post-show;
- How it can accomplish many important intelligence objectives;
- How it must be designed and targeted at several different groups in the organization: clients/decision-makers, trade show team, and employees at large.

Table 1 provides a brief summary of this article using these three dimensions:

Table 1: Trade show communication objectives

	Clients/decision-makers	**Employees at large**	**Trade show team**
Pre-show	Focusing the KITs awareness of the function	Awareness of the function Building allies/helpers	Training, awareness, coordination
At show	Briefings from the show Validation of direction	Building allies/helpers	Coordination, execution, realignment
Post-show	Post report reaffirmation of intelligences importance	Building awareness	Lessons learned

COMMUNICATION OBJECTIVES

Let's start with the objectives for developing communication around events. In my shows, communication is used for several purposes.

Increase awareness and understanding of competitive intelligence

Despite how popular intelligence is to us, for many others in our companies it remains a mystery and is often misunderstood. My chapter in the upcoming Starting a Competitive Intelligence Function book describes how trade shows provide an opportunity to increase awareness and understanding of competitive intelligence. Constant communication with management, employees at large, and members of the team is critical for building awareness of and understanding of the function.

Develop an intelligence plan

Since trade shows make up a significant proportion of a company's marketing budget, communication must result in a solid intelligence plan. For example, interviews with senior executives are the cornerstone of the communication plan. You must write up and communicate the plan to all involved so that they can effectively participate in the project. Communication is even needed to ensure that the team feels involved in plan development. You must also develop communication skills and concepts for creating data capture forms for the event, which must be easy to use and understand.

Train everyone who could assist in the event intelligence program

Communication can help teach employees the skills involved in competitive intelligence. For example, interview material can be sent to all who will be involved in interviewing, ethics guidelines can be sent out to all, and so forth.

Develop collection helpers

Both before the event and during the event, communication can be used to enlist the assistance of other individuals who will be at the show. At many of the shows I've participated in, providing general briefings and materials to those attending usually results in their offering assistance to the CI effort. Sharing the intelligence plan has resulted in valuable collection by those not officially part of the team when they come across the information.

Keep the plan running

Communication at the show is critical to ensure that all members of the team know what they are supposed to do and when to do it. For example, at all my shows, everyone receives a card which contains the contact details of all intelligence team members. Communication at events can prove to be difficult, especially if the event hall's design makes the use of cell phones difficult (too much metal).

Deliver intelligence

How you deliver intelligence affects how it is accepted, as previous articles in this magazine have demonstrated. Briefings during the event to ensure that the intelligence is what decision-makers need, final briefings and reports are all key to your communication efforts.

DECISION-MAKERS

As noted above, the communication function has many objectives. These objectives are aimed at everyone in the organization, starting with the decision-makers and CI clients. The opinion of these individuals impacts the budget, focus, and ultimate survival of the competitive intelligence function.

In my shows, we maintain a constant flow of communication to decision-makers, including emails and interviews that showcase the opportunities for intelligence presented by the show. Ongoing discussions concerning the event collection plans ensure that their needs are met.

During the show, we prepare a daily "newsletter" of intelligence from the floor and send it to the decision-makers, along with periodic briefings to ensure that this effort meets their expectations. Of course, post-show reports and discussions take place so that future events will meet their expectations as well.

COMPANY ATTENDEES

In addition to clients, we need to communicate effectively with all employees who are at the event, whether they are part of the event intelligence program or not. "General" employees have been my best source of collection assistance. These people comb the show floors, attend events, and conduct interviews as part of their show involvement. Communicating with them is critical to convincing them to spend part of their time also collecting for the event intelligence team.

If you handle this interaction properly, these employees also become salespeople for the intelligence effort when they return to the office. Pre-show communication informs them about the importance of event intelligence and what we will be doing. Of course, communication is more important from the perspective of letting them know how the event team can help them during the show.

EVENT INTELLIGENCE TEAM

Finally, communication plays a vital role with the event intelligence team itself, through pre-show plan briefings, coordination through proper communication at the show, and a daily discussion of the collection results. Any CI practitioner who conducts an event intelligence program should be aware of the critical importance of staying in touch with the event intelligence team during the trade show. New plans are issued, planning forms distributed, new instructions developed, and so forth. During the show, close and effective coordination rests on a well-organized communication plan.

If you are reading this column to understand how best to communicate intelligence from the floor, here are some suggestions from the chapter authors of the Conference and Trade Show Intelligence book. Joe Goldberg advises producing short reports with more substantive content as well as more in-depth implications and recommendations. The strict use of templates is a must for ease of reading, but also so that the intelligence team can more easily prepare daily reports. Many of the other chapter authors provide their communication forms and designs for readers to examine.

Ellen Naylor, in her article, has good advice regarding where intelligence should be sent both during and after the show. Her main point is that the clients are suffering from information overload (too much in the email inbox). So, her advice is to ask yourself: Who really cares about which pieces of information I have collected?

- How urgently do they need this information?
- Are there some key nuggets that are important to everyone that I should distribute immediately?
- How do my clients like me to communicate with them? Does the importance of the data change this?

Ellen also focuses on the concept of using multiple forms of communication to let key clients know about the event intelligence:

> ***"For example, you might prepare an email which contains the important nuggets that all competitive intelligence clients are interested in, and attach a document that contains a higher level of detail. Thus, those who are more interested in detail can open the attachment and read further."***

Having a communication strategy is a key requirement for managing an event intelligence program. I hope this column has given you ideas on how it can play an important role in helping you accomplish key intelligence objectives – how it is important before, after and at the show, and how it is important at all levels of the company. I can cover much more about proper communication at events, how to design capture forms, how to design event newsletters, and how to choose messages and messengers in future columns, but for now this column provides you with many ideas to think about.

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Evaluation Trade Show and Event Performance

with France Bouthillier

Competitive Intelligence Magazine, July/August 2009

Readers may have noticed that my past few columns have featured co-authors and this one is no exception. France and I have spent the past six months looking at how to evaluate competitive intelligence (CI), a topic of great importance in the CI community. We have learned much through our research and future issues will feature more of our findings. However, for now, the focus is on evaluating trade show intelligence – a sub-component of CI evaluation that came up in our research.

The topic of intelligence performance evaluation has been raised in the many emails I receive from this column's readers. It has also been the subject of much discussion at SCIP conferences, especially during the active dialog sessions. Measuring CI performance is even more critical in the midst of the current recession, when all parts of the operation are under scrutiny. Add to that the decline in trade show attendance (see, for example, SCIP's attendance figures), and the need for a solid evaluation framework is greater than ever.

Let's start off with the general concept of evaluating CI. In the 2006 SCIP study on competitive intelligence practice, survey respondents were asked two questions pertaining to how they evaluated CI. The results are reported in Table 1. What is most surprising is that 30% of the survey respondents had no measures. Looking at the trade show literature, I've reached a similar conclusion – many companies have no way of measuring performance. (See one of my earlier columns, "Making Yourself Popular", Calof 2005.)

> ***"Only 56 percent of firms participating in trade shows have specific objectives before participating in a given show. Only 46 percent of companies set goals before they exhibit, half are wishy-washy, and one of three exhibitors does not set quantifiable objectives." (Herbig, Palumbo and O'Hara 1996)***

So, the first problem is that for the most part, trade show performance is not being evaluated by most organizations and no solid measures for CI performance are in place. Double trouble.

Evaluating the tangible results of event intelligence program is critical. Otherwise, it will be increasingly difficult to obtain the resources to continue CI efforts at these events. Furthermore, with most companies cutting back on trade show investments, it will be doubly difficult to receive management approval to perform an activity seen as an ancillary part of a trade show – trade show intelligence.

Trade show attendance must be viewed in terms of intelligence investment rather than marketing cost. If your organization already sees things this way or can be convinced of the wisdom thereof, then standard measures of intelligence can be used – many are provided in the SCIP literature. It would be worth your while to sit down with your decision-makers to determine the objectives of a good intelligence program. Then evaluate its performance at the trade show based on these objectives.

For example, CI must be a decision enabler. If the intelligence developed from the event supports critical decisions, this contribution should be part of the event intelligence measurement system. In an evaluation conducted after a recent show, a decision-maker was quoted as saying, “It helped with a project I was working on.” Revealing a direct benefit of the event intelligence effort, this comment supported the intended goals of the trade show intelligence.

Table 1: The value of CI and performance measures		
Survey answers	**Number of responses**	**%**
Performance measures:		
• Customer satisfaction	301	57.9
• Decisions made/supported	248	47.7
• CI productivity/output	210	40.4
• Strategies enhanced	196	37.4
• New products or services	113	21.7
• ROI calculation	72	13.8
• No effectiveness measures	154	29.6
The value of CI:		
• New or increased revenue	152	29.2
• New products or services developed	147	28.3
• Cost savings or avoidance	141	27.1
• Time savings	116	22.3
• Profit increases	105	20.2
• Financial goals met	103	19.8
• No value measures	222	35.0

From: State of the Art, Competitive Intelligence Foundation (2006)

In our research, we have identified six different elements of intelligence organizations that can be evaluated. These can be applied to trade show intelligence performance evaluation as follows:

- ***Organizational performance at the event***. How well is the entire organization supporting its intelligence program? This could include such measures as the number of projects conducted at the event and the frequency with which your trade show clients ask you to undertake additional projects.
- ***Individual performance***. Is the CI team doing their job well? Instead of asking whether the intelligence itself is valuable, this question focuses on the performance of the CI individuals themselves. Measures look at whether a CI resource acted in a professional manner, helped identify intelligence, or was flexible in handling client requests.
- ***Project/process performance.*** Is the CI process handled in an appropriate manner? Instead of reviewing the project results, this part of the assessment determines how well the project

itself was conducted. This means assessing whether CI participants followed standard intelligence practices, used appropriate analytical techniques, and so forth.

- ***Output performance***. What is the quality of the intelligence output? This aspect of the evaluation focuses on client satisfaction with the intelligence output, the effect of the output on subsequent decisions, the reliability of the intelligence presented, the readability of the report, etc.
- ***Impact performance.*** What direct and intended impact did the intelligence have on the organization's performance? Many CI professionals have sought to measure this and create a link between intelligence and organizational performance measures such as sales, new product launches, savings, and so forth.
- ***Secondary impact performance.*** What indirect or unanticipated impacts resulted from the delivered intelligence? This measurement examines the secondary impacts of the intelligence, such as whether or not it was applied to subsequent decisions, whether the results were applied to decisions other than the original request, and so on.

In our study, we found that while clients raved about the impact of intelligence, it was almost impossible to measure that impact directly since no specific decision was made solely on the basis of the reported intelligence. Rather, intelligence was one of many factors affecting the decision. Thus, a direct financial measure could not be determined.

However, evaluative statements such as "It helped me make a decision" could be measured. The key for trade show intelligence is that your measurement efforts will be better served by obtaining agreement from your decision-makers. Statements such as "It broadened my knowledge", "It helped me identify new markets" and "It helped me make critical decisions" are more attainable measures of intelligence effectiveness than the numerical return on investment.

Our study uncovered significant problems associated with applying direct measures. First, decisions generally incorporate more complex input than a single intelligence report. In addition, the economic impact of a specific decision may not be felt by the company for many years (20 years in the case of one of the CI reports we reviewed) and then only if the intelligence is properly implemented – something that is beyond the control of the CI department.

Second, you don't have to look only for measures of the direct impact of the CI report; you can apply measurements related to the five areas identified above. This creates a more sophisticated measurement system, whereby you can focus more attention on performance measures in areas falling under CI influence, such as individual performance and project/process performance. In this way, the evaluation deals with achievable measures: how satisfied were clients with the intelligence results and how professionally was the intelligence conducted?

One final thought on measuring CI performance… This column has focused on event intelligence as an investment and on evaluating event performance based on the success of a specific, standalone, separate intelligence activity. But your organization may look at event intelligence as an ancillary trade show function and, therefore, as part of the "marketing cost". In this case, link CI performance measures to the objectives established by the marketing and sales group for the event itself.

The Center for Exhibition Industry Research (CEIR) has published many articles addressing what companies are looking for from trade shows. For example, in the article, “What attendees want from trade shows” (Tanner and Chonko 1999), the authors report the results of their survey and list dozens of reasons for companies attending trade shows. Some of the reasons that scored highest among respondents were:

- See new technology.
- Learn about regulatory issues.
- Observe what large institutions are doing.
- Learn about new product introductions.
- Examine products.
- Generate ideas and plans.
- Learn about existing products.
- Compare brands.
- Gain insights into the industry.
- Build relationships with exhibitors.
- Anticipate what product designers are thinking.
- Look for prospective suppliers.

If your organization sets its trade show objectives along the lines of the reasons provided here, it should be quite simple to link your event intelligence evaluation measures to these objectives. If, for example, one of the objectives is to “see new technology”, then CI could focus on identifying the most important new technologies for staff to see at the show. The measure of performance could then be the attendee’s assessment: “CI helped me see new technology.” If the objective is to gain insights into the industry, staff could be asked to assess the extent to which CI helped them develop such insights.

Align your CI measures with the organization’s objectives for attending the trade show. In this way, CI will be viewed as supporting the trade show initiative in the sense that it performs an ancillary service to those attending the event. In these days of cutting costs, however, perhaps it would be better to show how CI can help the organization attain its event goals than to try to position event intelligence.

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Trade Shows and Counterintelligence

Competitive Intelligence Magazine, September/October 2005

I recently attended a biotech conference in Philadelphia. Bio, as it is called, is the premier event in biotechnology and brings together scientists, government officers, association officials, company executives, and university academics. With its multitude of workshops, posters, parties, delegates, and booths, the opportunities for technical, government, competitor, and other forms of intelligence are enormous if planned carefully (as described in an earlier column).

Of course, whenever there is a great opportunity for you to gather information on your competitors, there is an equal opportunity for your competitors to gather information on you. Therein lies the importance of counterintelligence at trade shows.

I have seen companies unwittingly give up their competitive advantage at trade shows as few seem to pay attention to information and physical security there. In fact, as I have pointed out in prior articles, this is the one place where people want to talk and are frequently distracted.

The activities at Bio2005 are fairly typical of what occurs at a show. A reception is held in the country pavilion in the late afternoon and companies use this as an opportunity to attract new contacts and business. First, look at it from the perspective of your collecting information at an event. What opportunities are there to collect information that can support intelligence? Now consider it from another perspective: counterintelligence. Think about the ways in which your competitive advantage can potentially be lost. I will highlight a few of them in this column.

THE COMPUTER

Most of the booths at a trade show have computers, mainly to help make presentations. But they are also used to enter in important customer information, follow up notes from the show, and so forth. From a physical security perspective, consider all the people that are in the booth area during the party. Think about how easy it would be for someone to simply take one of the computers.

Another issue is the information on the computer. Of the many people whom I talked to at booths at both this conference and others, few were aware of what information resided on the hard drive or the file protection protocols.

Do you know everything that is on the computer you are using at an event? Furthermore, have you deactivated the infrared capability of your computer which allows external users to copy files from your computer remotely? How easy would it be to extract important information from your system without your knowledge? For those who think that the answer is simply to delete confidential files, note that there are several applications out there that can recover deleted files. There are two methods to explore if you wish to protect the information contained on your computer.

- ***Physical security.*** Minimize the probability of computer theft by using appropriate mechanisms, such as an alarm, chain, and so forth. Make it difficult for people to tuck your computer into their bag or briefcase and walk away.

- ***Information security***. Ensure that the computer you bring does not have information that could compromise your organization's competitive advantage. Better still, have a computer that contains only copies of the presentation and keep contact information physically on you on a separate system. As an additional step, deactivate features that would enable someone to download information from your computer without your knowledge. This includes infrared ports and perhaps other network features. Don't forget the value of maintaining appropriate password protocols as well.

THE PEOPLE

The wonderful thing about trade shows is the openness of people in answering questions. It is extraordinary how many questions I have been able to ask at conferences and trade shows.

I have also noted that when trade show booth employees feel that they are being presented with sales opportunities, they are quick to give up key information. The quarterback technique (outlined in prior SCIP publications) suggests that you direct a few questions at a target; then go back, ask them a few more, and have a few people from your organization ask a few questions. By the time all the answers are brought together, you will have everything you need to know about the target.

A Canadian company tells a story of how, after answering many questions posed to them at a trade show, some other company managed to directly copy their software product. At another show, we became aware of a foreign government's representative who approached various companies' booths and suggested that there were tremendous opportunities for them, but their government needed some sensitive information on the company to make the match. There was no opportunity, and unfortunately the companies that fell for it, lost valuable information.

Here are a few ideas to help with the people side of things:

1. ***Know what not to say***. Make sure every person going from your company knows what questions to refrain from answering and what information is confidential. In many of the companies that I work with, I find that few people have the same understanding of what information is confidential and what is not.

2. ***Establish a policy for sensitive questions.*** One of the best procedures I've seen was where a company set down certain questions that could only be addressed by someone from the intelligence unit. This allowed them to identify where the questions were coming from (sometimes a competitor) and how much information should be provided.

3. ***Limited or no alcohol***. This is one of the toughest rules to enforce but also one of the more important ones. As the saying goes, loose lips sink ships and alcohol is a big "loosener". At one of my earlier shows, one of my collectors got so intoxicated that they weren't aware of what they had collected but were sure they had said something they shouldn't have.

THE INFORMATION

"The smart eagle does not bare its claws" is an often-quoted saying in intelligence. At the heart of the concept is the practice of ensuring, through the creative assessment of a combination of information outputs, that the company does not lose its advantage.

For example, at the trade show, specific information comes from the actual booth information and signage (1). In the picture (above), the booth contained a prepared speech delivered earlier at the conference by a company executive (2). In addition, one of the company's scientists had a poster session in another part of the exhibition hall (3), while another scientist was giving a talk at one of the workshops (4). These are four "outputs" from the company and, from a marketing perspective, four great opportunities for the company to present its information to the market.

These four outputs also represent four opportunities for the company to present too much information. In a company with a good counterintelligence system, all four of these outputs (the speech, booth materials, poster material and workshop material) would be reviewed by someone from the intelligence function prior to their being presented at the event. This is done to ensure that the combination of the four does not provide a competitor with too much insight into the company's competitive advantage.

Intelligence is sometimes likened to putting together a jigsaw puzzle. We try to find the pieces and put together the puzzle. In counterintelligence, the idea is to ensure that there are not too many pieces left out there.

DISINFORMATION

The SCIP code of conduct provides a valuable set of guidelines to ensure that you do not behave in an unethical manner. Unfortunately, not everyone at trade shows subscribes to this code. I have seen both disinformation and corporate disruption practiced at trade shows.

One of the clues to a disinformation campaign: questions arising from several visitors to the company's booth about possible product problems, such as "I understand that your product does not do …" or "Is it true that your company is currently being sued for … ?" Without going into the details of the questions and where they were coming from, it was clear that this was part of a well-organized disinformation campaign which, upon further investigation, was traced to a competitor.

Welcome to another reason for the need for a counterintelligence operation at the trade show: to identify and neutralize disinformation campaigns before they can hurt your company. As a minimum, start tracking the questions and comments coming into the booth and assess them throughout the day to identify if there is evidence of an organized disinformation campaign. Look for patterns in the questions and comments that would be indicative of such a campaign.

This column has identified specific threats that I have seen at trade shows. This reinforces the need for all employees at the event to understand at least the basics of counterintelligence. Companies also need a culture of counterintelligence supported by appropriate training and procedures.

Depending on the country hosting the show, you may even need a special briefing on the country's collection norms. This could be done by consular officers based in the country who can help you identify country-specific counterintelligence issues.

Working with Friendlies to Broaden Your Trade Show Intelligence Reach

Competitive Intelligence Magazine, Summer 2019

This article describes a four-step process for broadening your event intelligence reach:

1. Identify your friendlies.
2. Classify the friendlies.
3. Approach and assign the friendly.
4. Look for additional friendlies at the event.

It's been an incredible past few months for me with trade show intelligence. I have been running training programs for small and medium-sized companies in several Canadian provinces and have enjoyed the stories of what it has meant to them: The start-up that now understands who their customers really are; an executive who has now figured out how to best distribute their products; the participant who used the event to develop more detailed customer personas; and more. But what I have enjoyed most, and is the subject of this issue's column, are the stories that these companies came back with about the help they got at the trade show (and before the show) from what I refer to as "friendlies" – **people who want to help**.

One executive came back from the show all excited about how a competitor had approached him at the event and said, "We have to stick together so that we can beat (another country) competitor; let's help each other." This competitor also offered the company valuable intelligence to help get the company's products into the right retail store. Another participant talked about how an ex-customer/distributor had approached them and, after saying how much they hated a particular employee of that company, ended the "chew-out" by saying, "Now that I've got that off my chest, I have a big Rolodex; how can I use it to help you?"

Perhaps my favorite "friendlies" experience arose out of a training program I was running for an ocean technology trade show. The room was filled with several companies, government officers, and association personnel who were going to the same show. As we talked about event intelligence and what their intelligence topics could be, the offers of help came. Customers offering to gather information at the event for their supplier; provincial government officers offering to help companies from other provinces get information; companies offering to team up with other companies in the room to help each other gather information at the event. Participants even offered to share their event intelligence plans with others in the program.

I have noted from my event intelligence training programs over the past several years a growing willingness among the participants to help other organizations both prepare for and participate in their intelligence activities at events. This should not really surprise anyone as it fits well with the observed growth in sharing related technology and concepts – whether it is the growth of sharing platforms such as discussion groups, LinkedIn and Twitter, or the growth of sharing concepts, such as open innovation. Open innovation is growing, and this could not happen unless people outside the organization were willing to help companies other than their own. Globally, the willingness of people to help others be more competitive is growing and has been noted in several articles and academic studies. Call this the growth of people who really want to help other organizations succeed: we are becoming the sharing economy.

In light of these "sharing and helping" observations, the rest of this article provides readers with an overview of a process for identifying, rating, approaching, and getting intelligence help from friendlies. The article assumes that you have well-developed intelligence topics and have identified for the event all the collection opportunities that make sense for your intelligence needs (if you don't, read some of my past columns to learn how).

This "friendlies" process leverages ideas from sociology, psychology, and source recruitment. Let me start this process with a story I often tell. I had one event where we started with a core team of three of us but by the end there were over 100 people collecting for us. Who were these friendlies? How did I find them? How did I get them involved? How did I assign them? The four-step process described below summarizes how I got all these people to help and I hope it is a useful framework for those reading the article.

Step 1: Identify Your Friendlies – Who Are They?

Technically, I refer to friendlies as any people who might want to help me develop intelligence. I divide my friendlies into two broad categories:

- **People who care about me.** These are my friends, classmates, and people I share a common bond with – whether it's through interests, clubs, religion, sports, family/kids' activities (and more). I have friends, work colleagues, and ex-work colleagues, clients, and yes, even friends, who work for competitors who would like to see me succeed.

- **People who care about my company.** These are people and organizations that truly want to see my company succeed.
    - **My organization's network**: Think of all the people who care about others in your organization. These are their friendlies who perhaps your co-workers can reach out to for you.
    - **Customers**: They should want better products/services coming from my company and may want to help me at the event to make that happen.
    - **Association executives**: They should want to see the entire industry thriving, including your company.
    - **Government employees responsible for the industry I am in**: They should have an interest in seeing the industry do well and that should include seeing my company do well in that industry.
    - **Suppliers**: They benefit from my success (with orders) as my company grows.
    - **My company's employees at the show:** You would be amazed at how many of my clients did not realize in advance of the show that there were going to be several people from their organization at the event.
    - **Competitors:** Finally, as I saw at the last collection of shows, even some competitors want to work with me to beat out a larger competitor, the common enemy.

I am learning through lots of experience that in the case of many organizations, my company succeeding helps them to succeed, or they simply care about my company. Whether they are friendlies who on a personal level care about me and want me to succeed, or friendlies who care about my organization and want it to succeed, there are many people who may be willing to gather for me at the event, introduce me to their sources at the event, provide me with industry insights, and even participate in analysis sessions at the event. The first thing I like the organizations in my event intelligence programs to do is to make a list of all the friendlies who will be at the event they are going to.

Step 2: Classify the Friendlies – Who Are The Best Friendlies to Work With?

There is a lot of attention in our field given to assessing reliability and validity, and you need to figure out who in your list of friendlies is reliable, a true asset for your event intelligence program. Brad Ashton, one of our best competitive technical intelligence practitioners and a good friend, gave me a superb list to use for evaluating primary sources (see Table 1).

Table 1 - Evaluating Primary Sources (by Brad Ashton)	
Effectiveness	Content relevance, focus, uniqueness
Timeliness	Can we get answers in time?
Historical reliability	Does source have a good track record?
Ease of access	Can we reach the source easily?
Cost	Acquisition and process cost
Compromises risk	What do we have to give up?

This is my starting point for classifying my friendlies. In this regard, I use four broad criteria:

1. **Friendlies' ethics:** This to me is critical. Those helping me to collect are in a sense acting as an agent or extension of my organization, and as such I need them to act in a way consistent with appropriate ethical practices. Using, for example, SCIP's code of ethics, they must comply with all applicable laws, disclose relevant information prior to all interviews, and so forth. Please note that word sometimes gets out when friendlies engage in unethical behavior, and people will assume that the friendly is a part of your organization. To me, this is the first criterion to apply when assessing friendlies. If their ethics are not consistent with those of your organization, you should not assess them relative to any other criterion, as you will likely regret working with them.

2. **Strength of friendlies' relationship with you and/or your company:** To what extent do they really care about my company or about me? Are they truly a "friendly"? This is really about who I can trust. Do they really want to help my company or me? There is no point looking at their skills, network, reliability and knowledge if they are not genuine a friendly.

3. **Skills, expertise and historical reliability:** This is adapted from Brad Ashton's list. Does the friendly have a good track record for helping out your organization or you? Do they deliver?

Events are very temporal and if you are relying on a friendly to gather information for you or introduce you to a source, then if they are not reliable, you will have lost a very important opportunity. Friendlies are great as they bring with them a valuable network at the show and even additional collection skills (maybe they are great at interviewing the kinds of people you are not good at interviewing). What I really need to know is what the friendly's event intelligence-related strengths are and whether I will get access to them.

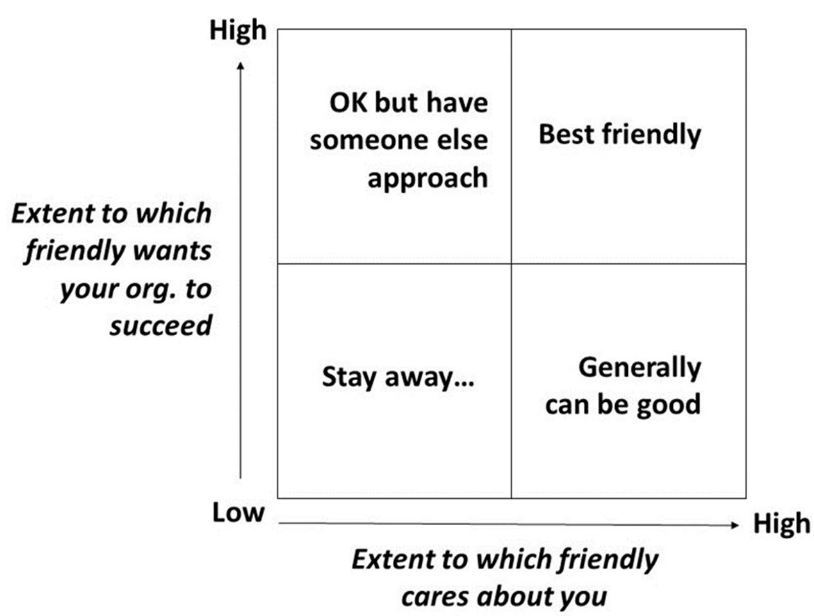
4. **Subject matter expertise:** I have written in many of my columns about the need to bring together people with the appropriate technical knowledge, to be able to both ask the right questions and understand what is said in reply. Not all intelligence needs require subject matter expertise, but as you classify your friendlies, you will need to know what their expertise is if the collection task requires technical knowledge and/or expertise.

In assessing your friendlies against the above criteria, it is important that you have accurate information so as to perform an objective assessment. For the most part, friendlies are people who either I know or someone in my company knows; thus, the assessment should be straightforward. However, friendlies whom neither I nor others in my organization know can be called potential friendlies or strangers who will become friendlies. In such a case, you will need to get some help. I will discuss this in greater detail in a future column.

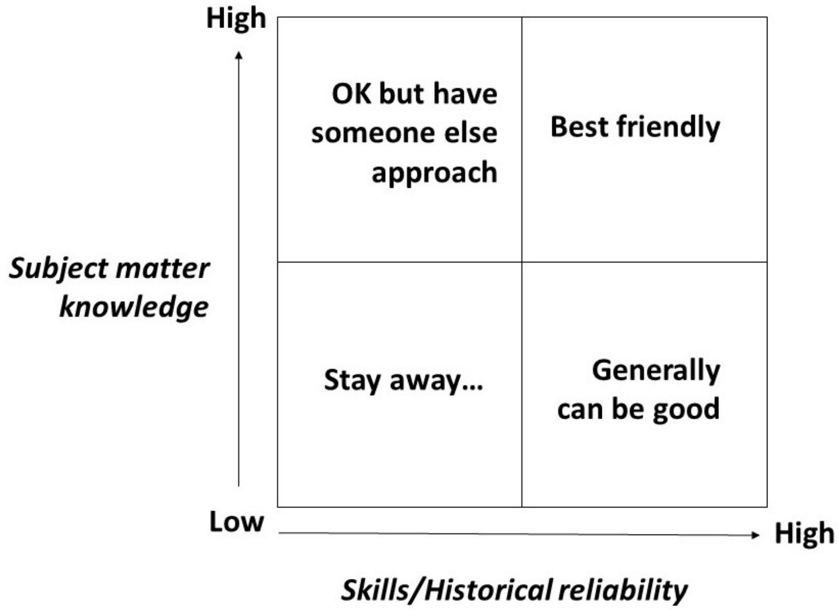
Figure 1: The friendly selection process

Step 1: The ethics screen – do they match your organization's ethics? If yes, proceed to Step 2.

Step 2: Who can I trust, who really is a friendly?



Step 3: Who can I rely on? (For those friendlies who are truly friendlies.)



Step 3: Approach and Assign the Friendly

In Steps 1 and 2, you should have identified true friendlies with the necessary ethics, skill/connections, and expertise that you need for your event intelligence initiative. Now it's time to approach them and hopefully get them to agree to help you. Two key philosophies I always think about as I approach my friendlies:

- **I do not want to add to the workload of my friendly**. Everyone is going to be busy at the event, including your friendlies. The best way to lose a friendly is overtask them to the point that they can't do what they were there to do.

- **I want to help my friendly**. You are not the only one who likely wants to do more at the event than you have time to do; your friendly may also be able to use your help.

At my last training session, virtually every company identified simultaneous events that they wanted to attend (for example, two or three presentations happening at the same time), but one person can't be in two places at once. Several participants identified more interviews to do than they had time to do. My personal favorite was a program participant (TSI program) who identified 70 hours of collection tasks in a three-day show, with only one real resource who could work the intelligence tasks (herself). **You do the math: everyone can use help.**

In approaching your friendlies, first find out what they plan to do and want to do at the event. What booths do they plan to visit, talks they will attend, and so forth? To help your friendly, offer to help them develop an intelligence plan. Offer to ask questions on their behalf at sessions you will be attending and see if they are willing to do the same for you. If there is a workshop or other event at the trade show/conference that both of you are going to be attending, see if there is a way to team up at that event to help each other. When I mentioned this at my last event intelligence workshop, one of the companies told me how they bumped into five “friendlies” at the same presentation at a trade show. He said that they spent most of their time at the presentation talking to each other and ignoring the speaker. While talking with friends about office politics or gossiping about what is going on in each of your lives is a lot of fun, it is can be a big time waster at events. In approaching your friendlies, it’s about helping to ensure that each of you maximizes what you can get out of the event; it’s about you helping your friendly where it makes sense and your friendly helping you.

Step 4: Look for Additional Friendlies at the Event: Be Flexible

No matter how well prepared you are for an event, or no matter how good a job you do in identifying and recruiting friendlies, you will see people at the event whom you did not expect to see. It has happened to me at most events I have gone to. Whether it is my past students, past clients, or someone I worked with in the past, relatives, friends, association mates, etc., it happens a lot. There are hugs, handshakes, and lots of smiles (a true friendly), as well as discussions of matters largely irrelevant to my event intelligence needs or theirs; but it is fun.

Now, I want all of you to continue this normal “bumping into” experience and turn it into a friendly recruiting session. This means going through Steps 2 and 3 and figuring out how to help each other maximize the event insight opportunity.

CONCLUSION

Friendlies are a true gift for intelligence professionals. This column has focused on the huge benefits that can arise when you and your friendlies work together to maximize event intelligence opportunities. Mutual benefit is key. You do not want to be seen to be using or manipulating your friendlies. Ensure that there is mutual benefit – even better if your friendly gets more out of your working together than you do. Failure to ensure mutual benefit could result in the friendly feeling used and they may no longer want to help you. Also, your reputation will suffer, which will make it difficult for you to find any more friendlies.

One word of caution: do not forget that events (trade shows, conferences, and so forth) are great opportunities to catch up with your friendlies. It cannot all be about intelligence. I want you to be “friendly” with your “friendlies”. Build time into your event intelligence schedule to catch up with them, but do this in the context of also building in time for mutually beneficial intelligence. It should not be 100% of the friendly time being devoted to intelligence; nor should it be 100% of the friendly time being devoted to social interaction.

One final, friendly piece of advice or a challenge… Concentrate on making new friendlies at the event, people who can help your ongoing intelligence program and whom you can help as well.

Integrated Intelligence: An Exciting Direction for SCIP, CI, and Trade Show Intelligence

Competitive Intelligence Magazine, February–April 2016

The front page of the SCIP web page (www.scip.org) says, "SCIP Integrated Intelligence." Nan Bulger, CEO of SCIP, talks about the importance of integrated intelligence in many forums, such as in the webinar titled "The Evolving Role of Intelligence", (https://www.youtube.com/watch?v=5HN0QvHF9i0&t=5s) and in a presentation to a SCIP chapter, "Integrated Intelligence in the Health Care Industry" (SCIP Spain presentation). Even this year's annual conference headlines SCIP's focus on integrated intelligence with "Four days of focused development in strategy and Integrated Competitive Intelligence".

Integrated intelligence is perhaps one of the biggest developments ever seen within SCIP and in my opinion is a very important step forward in ensuring that competitive intelligence professionals maximize their contribution as decision support professionals for their organizations. In this issue's column, I will be focusing on what integrated intelligence is and its implications for event intelligence programs. Given the importance of this evolution in intelligence thinking, I have also included as part of my article most of the transcript from Nanette Bulger's presentation on integrated intelligence. The transcript is provided at the end of the article.

INTEGRATED INTELLIGENCE WITHIN THE CONTEXT OF EVOLUTION IN COMPETITIVE INTELLIGENCE THOUGHT

The starting point in understanding the concept of integrated intelligence, and its implications for event intelligence in particular, is to look at how intelligence has evolved over the past 30 years (since the inception of SCIP). When asked in the interview how intelligence has evolved, Nan mentioned the early days of CI as being rooted in understanding competitors.

> ***"Now, today, it's really evolved into understanding not just competitors, but really putting the customer at the center of the intelligence you collect so you can determine how best to help your customers compete in the market and help your customers make money, and also looking at how there's a competitive effect from the competitors, how the political environment affects decisions that customers make, how the market dynamics affect the customer, and so forth.***
>
> ***It's really evolved into a more sophisticated discipline, where it's not so much about collecting data anymore, but it's about conducting sophisticated analytics so that you can help your company make decisions about the market in order to help their customers."***

IMPLICATIONS FOR TRADE SHOW INTELLIGENCE PROGRAMS

Many event intelligence programs are rooted in the concept of understanding competitors, which is consistent with the early days of intelligence. In fact, in 2012, Fletcher/CSI conducted a study titled "Trade Shows as Sources of Competitive Intelligence", which proved this. With 408 respondents from around the world, it remains one of the most comprehensive event intelligence studies ever conducted. Among their many findings was that "the most common goal of CI collection at trade shows is to learn more about competitors' new products". The second most common response was "general competitor insights". This response is consistent with the older view of competitive intelligence as a domain focused on competitors. But with this evolution in intelligence inherent in the integrated intelligence concept, two major changes in focus are envisioned:

1. Topics will have to be broader than competitor insights and knowing about competitors' products. While trade shows do have an abundance of information on competitors, they also have the kind of information needed to address the issues that Nan Bulger raised – market information (market dynamics), political environment, and so forth. The broadening of topics beyond competitor profiling to include customer insight, market dynamics, political environment, technological environment, and other areas that were mentioned in the interview, will also have profound implications for the skill set that trade show intelligence practitioners will need to have (this will be discussed in more detail in the next section).

2. Customers will become the focus of event intelligence programs. It was Peter Drucker who in the 1950s wrote: "The objective of a company was to create and keep a customer". Nan Bulger, in her interview in 2015, made it clear that the objective of an intelligence program should be to develop the intelligence that will help your customers compete more effectively. This means that the customers themselves must be at the center of your event intelligence program. Events, by the way, are great places to connect with your customers to find out what is on their mind and to learn about the intelligence needed to help them be more competitive. Even the concept of competitor profiling which, as mentioned, has been very popular at events, would then shift from "How are my competitors impacting me?" to "How are my competitors helping my customers be more competitive?" What do they know about my customers that I don't know?

   This evolution of intelligence towards a customer focus has profound implications for how all intelligence teams must view their intelligence needs in general and the focus of event intelligence specifically.

DEFINING INTEGRATED INTELLIGENCE

When asked to describe what integrated intelligence was, Nan Bulger provided the following answer:

"Integrated intelligence is really… we touched on it a bit. I spoke about how, originally, we looked at competitors. Now what we've done is actually integrated skill sets into the intelligence discipline. When I'm looking at an economic situation, I have a certain skill set that I need in order to understand economics and political situations in a regulatory environment. When I'm looking at competitor intelligence and market intelligence, I need a skill set that really enables me to understand marketing, understand how to segment markets, understand how to build a competitive landscape, and understand competitors.

When I look at customer insights, we've often siloed market research and customer insight separate from intelligence. Today we want to bring that together so we understand not only competitors, as I said before, markets, but really synthesize that with the information we have about customers. And then, of course, pulling in the other aspects like competitive technical intelligence, where I understand white space and adjacencies and products of the future.

All of these different types of intelligence require you to have specific skill sets that you bring together. It's the integration of those pieces of intelligence and the integration of those skills. The integrated intelligence professional of today is a very sophisticated strategist and analyst because they have those skill sets and they know how to fuse those skill sets together."

IMPLICATIONS FOR TRADE SHOW INTELLIGENCE PROGRAMS

The integrated nature of what Nan Bulger described is significant. It's the integration of different analytical techniques and subject matter expertise to enable intelligence professional to understand the total environment. This may require involving different parts of the organization in your trade show intelligence program.

In the CI practices study that I am working on with Nisha Sewdass and Ruben Arcos, we noted that several organizations had multiple "intelligence type units." Some had a centralized CI unit that was focused on competitors, while also having customer insight in marketing and technical scouting in R&D. One organization noted five different places in their company that had intelligence type objectives. At SCIP Europe this year, several presenters spoke about how they had customer insight in one part of the organization and competitive intelligence in another. Many at the conference talked about the need for these units to work together.

Integrated intelligence actually means all these units should work together. For an event intelligence practitioner, this means bringing together all of these groups for an event that will take advantage of the integration opportunity provided by the event. For a sole intelligence practitioner, or if there is only one intelligence practitioner from the organization going to an event (which is more the norm, according to many past studies) it means that the one person who is going to the event will need broader skills and knowledge, such as the ability to conduct interviews with a broad group of constituents from many areas in the competitive arena, including technical, market, political, competitor, and customer interviews.

They must also be able to ask the appropriate questions, and speak the language associated with these areas and understand what they are being told. Add to this the knowledge of appropriate analytical techniques associated with these areas, including classic market assessment techniques (for example, Porter's five forces, life cycle analysis, political risk analysis), business analytics techniques (for example, word maps and sentiment analysis), and other types of analytical techniques.

Events are well suited for this new integrated view of intelligence, because all the people associated with this broader definition (technical, marketing, political, etc.) are at the event; the information is there. But to take advantage of the opportunity within the context of integrated intelligence will require a rethinking of the resources being brought to the trade show. Here are two ideas:

1. **Broader training for event intelligence practitioners.** Practitioners will require training in these different areas. You will need a bigger toolkit and be comfortable collecting and developing intelligence associated with the Integrated Intelligence concept. This includes, as mentioned earlier, the political environment, technical environment, market environment, and so forth. The website, voiceofthebusinessacademy.com, advertises some courses to help readers learn about different analytical techniques, including those in analytics.

2. **Increased participation with others from the company.** I have been saying for many years that event intelligence practitioners need to partner up with others from their organization who are going to the event. In terms of the concept of Integrated Intelligence, this has become more important than ever. If there is a need to understand the technical environment, and those being interviewed at the event will be technical in orientation (for example, R&D personnel, scientists, etc.), why not enlist the assistance of those at the event from your organization who are also technical? If it's about the political or legal environment, why not involve someone from the legal department from your organization?

   In terms of this increased participation with others, it could be with those already at the event from your organization (including those manning the booth as well as those in general attendance) or it could be with those who are back at HQ. For the latter, I have had a lot of success in setting up conference calls with people back at headquarters during an event, where I tell them some of the things I have learned that apply to their area and ask them for their opinion, interpretation, help, etc. I even had one event where I asked someone from the appropriate area of the company to email an individual at the show and introduce me to them. If your organization has a customer insight function, invite them into your event intelligence program. Similar invites should go to any part of the organization involved in environmental scanning.

   Integrated Intelligence for an event will be enhanced if all those in your organization with intelligence-type responsibilities and skills are involved.

Integrated Intelligence means recognizing that a trade show provides the opportunity to use a broad array of skills and knowledge to develop a more comprehensive picture of the entire competitive arena. This is to develop the intelligence that will make your customers more competitive and enhance your organization's ability to succeed.

My challenge to all who are reading this article: discuss the concept of Integrated Intelligence with fellow intelligence practitioners and talk about its implications for your job in general, and for your event intelligence program specifically. Read the full interview below with Nan Bulger to get a more comprehensive view of what Integrated Intelligence is. This is a profound change from how we conceptualize intelligence; the status quo really does not apply and with any significant evolutionary step, significant consequences ensue. Discuss these with your CI colleagues and with others at your company.

Transcript: Interview with Nanette Bulger, CEO of SCIP, February 2015

Video also available at

https://www.youtube.com/watch?v=5HN0QvHF9i0&t=5s

Thank you. Can we start by providing a definition, or can you explain what competitive intelligence is?

Competitive intelligence is actually the decision support for companies to really help understand their markets, understand the market dynamics, the competitive environment; and to help them make decisions to give them a competitive advantage in the market. Competitive intelligence isn't just about collecting data; maybe 20, 30 years ago, it was about the collection and expertise in collecting information, but now it's really evolved into sophisticated decision support and analytics. It involves looking at the competition, market environment, market sizing, and so forth, for the purpose of really helping people understand how best to compete in a market.

And how has competitive intelligence evolved?

It's evolved out of intelligence that's been used for, really, centuries to strategize both in military environments and politics, etc. Basically, in the beginning, about 30 years ago, competitive intelligence focused primarily on the competitor, as a means of placing that competitor focus at the center of your decisions and understanding the competitive landscape, understanding what competitors were doing to compete, collecting data about competitors in the form of human-source collection, as well as secondary or printed-source collection.

Now today, it's really evolved into understanding not just competitors, but putting the customer at the center of the intelligence you collect so you can determine how best to help your customers compete in the market and help your customers make money and look at how there's a competitive effect from the competitors, how the political environment affects decisions that customers make, how the market dynamics affect the customer, and so forth. It's really evolved into a more sophisticated discipline, where it's not so much about collecting data anymore, but about conducting sophisticated analytics so that you can help your company make decisions about the market in order to help their customers.

What are the basic aspects that make up competitive intelligence today?

I mentioned it a little bit. When you're looking at a business environment today, it's much more sophisticated than it was 30 years ago, simply because we're a global environment. It isn't enough to look at one particular region of the globe and understand the landscape there, because the landscape changes depending on where you are in the world or on the planet.

Basically, you have to build an environment to understand various global situations. In other words, competitive intelligence, if you were to look at it in terms of a spoked wheel, you do have economic intelligence. That really helps you understand regulatory environments for different governments and different political situations regionally. There are different market dynamics depending on what region you are in, which includes the demographics and things like that. You have different things that are going on, business intelligence-wise, which is really collecting information on the size of the markets in various areas. You have competitive situations that are different depending on what part of the globe you're in.

These are all the aspects of intelligence, so you have that competitor intelligence, that market intelligence, the economic intelligence that you collect, the business information, business intelligence you collect, and also the customer insights, really understanding customer intelligence and customer insights. All of these things can be very, very different if I'm here in the US, in South Africa, the Middle East, or Europe. It's very important to understand all of these aspects of the business environment that surround your customer and your customers' buying patterns on a regional basis. That's why competitive intelligence has really become a more sophisticated discipline.

How does it help you compete in the marketplace?

Basically, if you can understand your customers, the customers of today – I speak of the customers of today and also the customers of the future. If you can understand what's motivating your customers today and how you can help them as a company or organization, make money in their business, or get the products and services they really want and need, that's going to help you compete.

Those customers change based on several different things. They change based on the environment you're in, because cultures are very different, economic situations are very different, so it's understanding that. It also really helps you compete because you can understand the way the dynamics are moving in the market, so you can really determine who your customers of the future are going to be. Your customers today may not be your customers of tomorrow.

It really gives you two advantages. It helps to educate you as an organization about the environment in which you're working, who those customers of today are, what motivates them to do business with you or to work with you, and then to help you identify what technologies and products or services that they're going to want in the future, what motivates those customers of the future. That's where you see a lot of technology development, that's where you see the game changers and things like that happening.

Another thing that really affects you as well is, over time, there's been an increase in data sources and the sophistication of available information. That's really also changed the way we operate as competitive intelligence professionals, because we have a lot of data, and we really have to synthesize it in order to make these sophisticated decisions on a global basis for each region.

And the title of today's talk is "Integrated Intelligence". We haven't gone into that much. What does integrated intelligence mean? Can you provide a quick overview of that?

Sure. Integrated intelligence is really… we touched on it a bit. I spoke about how, originally, we looked at competitors. Now what we've done is actually integrated skill sets into the intelligence discipline. When I'm looking at an economic situation, I have a certain skill set that I need in order to understand economics and political situations in a regulatory environment. When I'm looking at competitor intelligence and market intelligence, I need a skill set that really enables me to understand marketing, how to segment markets, how to build a competitive landscape, and understand my competitors.

When I look at customer insights, we've often siloed market research and customer insight separate from intelligence. Today we want to bring that together so we understand not only competitors, as I said before, markets, but really synthesize that with the information we have about customers. And then, of course, pulling in the other aspects like competitive technical intelligence, where I understand, are white space and adjacencies and products of the future.

All of these different types of intelligence require you to have specific skill sets that you bring together. It's the integration of those pieces of intelligence and the integration of those skills. The integrated intelligence professional of today is a very sophisticated strategist and analyst, because they have those skill sets and they know how to fuse those skill sets together.

That's one piece of integrated intelligence. Another piece of integrated intelligence, which we can talk about in a separate interview, is really integrating what you do as an integrated intelligence professional with other disciplines in the company. I want to have skills as an intelligence professional so I can interface with the finance people, as an example, or the supply chain people, so they work with me to help develop the decision support that's really needed by the company. We'll cover that. That's really integrating with other disciplines.

A third aspect is really integrating this decision support that you get by understanding these various pieces into the planning cycle within a company. We'll talk about, in another interview, how we actually take the skills that we have and build the touch points for intelligence decision support into each piece of the planning cycle within a company. Those are really the big pieces of integrated intelligence and how you pull it together and you really build early warning systems to help your company make decisions about how to be competitive in a market.

Thank you. This is a really interesting topic, and I'd like to do further interviews so we can go into more depth on the points you mentioned about integrated intelligence.

Yes; it's a very sophisticated process. It's grown, as I said, over the past 30 years. It's become much more sophisticated and mature. It's metamorphosed and, really, with the challenges of globalization and available information and really pulling together the most important pieces of information and decision support, it has become quite sophisticated. I very much look forward to breaking down each piece of it and helping people to understand that, because it's an exciting field, it's a great place to build your skills, and it's really needed by companies around the world.

Insight through Open Intelligence™

with Paul Santilli and Gregory Richards

Competitive Intelligence Magazine, Fall 2017

In my column last September (Sept–Nov 2016 issue), I wrote about how competitive intelligence can help an organization's open innovation initiatives. Open innovation is one of the hottest topics in industry and is driving R&D and innovation in many of the world's largest companies. Since the column was published, I have written and spoken a lot more about open innovation and competitive intelligence and attended many interesting presentations about both topics.

Among the more interesting presentations on intelligence that I attended were Paul Santilli's talks at SCIP Europe (Madrid) and SCIP International (Orlando) on Hewlett-Packard Enterprise's (HPE) OEM intelligence initiatives. It dawned on me that, under Paul's leadership of HPE's OEM intelligence, intelligence efforts had broadened and in fact encompassed some open innovation concepts. Paul and I have talked about this for almost a year now and as a result, we have both come to realize that there is a need to change elements of the competitive intelligence model to bring open innovation concepts into competitive intelligence.

At the same time, I have been discussing similar concepts with my colleague, Greg Richards, from the Telfer School of Management regarding the challenges of integrating analytics into this as well. We are calling this new concept, Open Intelligence (OI). It involves vastly expanding the traditional boundaries of who is involved in developing competitive intelligence, the frequency of competitive intelligence project updating, and the breadth of the kind of information used in the intelligence efforts. In this column, we outline the basic concepts of open intelligence and provide a few examples of elements thereof, from a practitioner's perspective.

We first address the challenges relating to the sheer velocity of change and ubiquity of data in today's organizations and the implications for competitive intelligence (CI). We then provide an overview of open innovation concepts, followed by a discussion and case study example on open intelligence. We conclude that the types of insights generated from open intelligence could make for an exciting time for CI.

THE CHALLENGE

Paul and I have been involved with competitive intelligence for over 20 years and our other partner in this endeavor, Greg Richards, has been at the forefront of big data and analytics for 10 years. In that time we have all seen some significant changes in the business environment. The three biggest changes that CI has to address (and these changes will only increase in the future) are the speed of change, the growth of international activities (not just selling internationally but sourcing) and increasing data complexity – let's call this the big data challenge.

The speed of change is something that we can all agree has been accelerating. In 2011, Harvard Business School professor and noted management thinker, John Kotter, wrote:

> ***"Anyone in the business world – even casual observers of it – knows that it's currently experiencing a rapid rate of change. New companies spring up seemingly overnight. Products and services that were revolutionary two years ago are rendered obsolete if they don't adapt to market changes fast enough. The rate of change in the world today is going up. It's going up fast, and it's affecting organizations in a huge way. The evidence of this can be seen almost everywhere – lifecycle of products, number of patents filed in the US Patent Office, amount of cell phone activity across national boundaries – on and on and on. And what's particularly important is that it's not just going up. It's increasingly going up not just in a linear slant, but almost exponentially."***

What does this mean for CI? Many intelligence projects, such as tracking customer needs/changes, technology developments, etc., need to take place on practically a daily basis, as things can change frequently. Looking out for the emergence of any threats and opportunities needs to be done timeously so that managers can react, but the rate of change is greatly compressing the amount of time available to gather, analyze, make sense of the information and act on it – before it's too late.

As for the "big data" complexity problem, at the SCIP conference in Atlanta (May 2017), a dominant theme among many of the keynotes was big data. Steven Hughes opened the conference with a talk titled "Big Data is our Future", while on the second day, Major General Neeraj Bali presented a case study from the Indian army in which big data figured prominently. Some of the numbers quoted in the presentations were: 31.25 million messages are sent every minute; Facebook sees 30 billion pieces of shared content every month; 2.77 million videos are viewed every minute; Google users perform 40,000 searches per second; more than 196,000 databases are published annually by the US government; and by 2019 1 million minutes of video will be uploaded every second. It would take five million years to watch all the videos posted each month.

In addition, we have all heard about the internet of things (IoT) with increased machine-to-machine communications, data-gathering sensors, and more – some of which generates data that can be used for CI. Social media, Twitter, blogs, etc. also produce data that can be used in intelligence programs. It's not that the traditional primary sources of information, like interviews, are not important for intelligence, but the growth in and availability of online videos, discussions, materials, etc. provide great opportunities on the collection side of intelligence. The problem, however, is coming up with a way to cope with all this data. IBM, in their big data and analytics hub, writes about the Four Vs of big data (IBM, 2017):

1. **Volume or scale of data.** For example, most companies in the US have at least 100 terabytes of data stored; 6 billion people globally have cell phones.
2. **Velocity/analysis of streaming data.** For example, 1 terabyte of trade information is captured by the New York Stock Exchange every day. There are 18.9 billion network connections – that is, 2.5 per each person across the world.
3. **Variety or different forms of data.** For example, 400 million tweets are sent per day, 4 billion hours of video are watched on YouTube each month, and 30 billion pieces of content are shared on Facebook each month.
4. **Veracity or uncertainty of data.** Notably, 1 in 3 business leaders doesn't trust the data they use to make decisions, with poor data quality estimated to cost the US economy alone $3.1 trillion per year.

There is one more item to add to this list – that is, the need to deal with international sources of information. This is where we combine two of the change factors: data complexity and international. Tomorrow's (even today's) competitor may come from outside your country. Many of your customers may also be based in other countries, while technology and other innovations can come from anywhere in the world. Managing in this environment will require you to access information sources in these countries, knowing what the best sources of information are in foreign environments and in some cases, dealing with the fact that the best information for your intelligence program may not be in English.

The challenge for CI is how to integrate the opportunity provided by this volume of data with our more traditional information sources, while addressing the problems relating to data volume, variety, velocity, veracity, and international factors.

The combination of the rate of change, international factors and the big data challenge means that CI teams will need to come up with ways to increase the frequency of their intelligence project updates, while also integrating a broader array of data. Doing this as a one- or two-person intelligence team is going to be difficult. The following sets out how we are proposing adding to the concepts of competitive intelligence to address these challenges – a reconceptualization of the phases of intelligence and the addition of concepts from open innovation to intelligence.

NEW IDEAS WITHIN THE WHEEL OF INTELLIGENCE

Traditional CI approaches revolve around some version of the wheel of intelligence, one in which we have seen leading organizations use terms such as issue identification, plan generation, data acquisition, data analysis, and recommendation.

There are many variations of this approach based on the corporate management structure and decision-making authority, size of the organization, and the type of issue to be resolved. But these five steps are really the crux of any "generic" CI effort in an organization. The problem with this traditional approach is that the time for all of this to happen can exceed several weeks or months before "actionable insight" can be developed. Add to that the time for the organization to actually execute on the insight (if they do at all) and we are talking additional months added to the overall CI lifecycle.

Given the time frames involved, the impact of the Four Vs (Five, counting international) associated with big data can make this traditional approach grossly inadequate and subsequently useless. Business disruption and industry changes occur in the blink of an eye and through the globalization of the digitized world we live in, can affect regions and potentially world economics in a fraction of the time it took only 10 years ago. Data and insights that are months out of sync with reality cannot provide a competitive advantage to any organization, which ultimately improves your competitors' chances of identifying and capitalizing on the market and business data scenarios before you do.

Rather, an approach is needed that will take into account the volume of information, the sources, the ability to manage the content, and the organizational flexibility to not only adapt, but to flawlessly execute on a regular basis what will be needed in the internet of things (IoT), the big data era, international dimensions of data, and more. There are several strategies that can be employed to help navigate the challenges stemming from such an environment during this important data collection and analysis phase.

DATA GENERATION

First, in terms of data generation, the sources and volume of data overall are exploding. This growth is expected to continue at an exponential rate, with an estimated 50 billion connected devices by the year 2020 – and this is in the IoT space alone! There is essentially no such thing as a suitable environment for "batch" processing – anything not done as close to real time as possible will become useless. So, it is critical to know that the further from the time the data is generated to the time of analysis, the more misleading and outdated the data becomes – and all downstream activities of analytics, processing, insights and execution eventually snowball into an extremely high-risk business strategy.

That is not to say that you should just hang up the proverbial CI hat and chalk this environment as a no-win scenario. Rather, there are techniques available for moving closer to the "real-time" environment that will provide valuable insights and ultimately a competitive advantage for your organization.

There are many techniques (albeit some more advanced than others) that have shown great promise in getting better data, getting it quickly, and expanding the breadth of data collection to include more value-rich content. These techniques include:

1. **Concurrent analysis methodologies:** Simultaneously collecting, analyzing, and sharing the data with stakeholders in a reiterative parallel process, rather than serially collecting and vetting the data with stakeholders, which can take far longer in terms of time and resources.
2. **Organizational efficiencies:** Built-in hierarchical structures that encourage quick data sharing and communications without long lag times in decision-making and execution.
3. **Real-time data collection methods:** Ability to harvest content from thousands of sources to effectively pull valuable "golden nuggets" from the vast amount of overall data.

TOOLS FOR DATA GENERATION AND ANALYSIS

Secondly, the use of specific data-management tools becomes a necessity in this data-rich environment. Public domain search engines fall woefully short in providing content in a format that is user-friendly, and throwing low-cost physical resources at the problem only leads to more confusion and frustration in coordination and results in a reduction in speed to insights. Knowledge management tools or related automation mechanisms are crucial for navigating the volume of data coming from the web. This includes not only public domain source content, but social media, customer feedback, paid sources, etc. The key determinant in the appropriateness of the result will often depend on the robustness of the input content. Identifying and managing the resources that provide data for the automation tools are critical areas of development. Letting the tool do the "heavy-lifting" of analytics with source content that routinely numbers in the thousands or tens of thousands of sources (or more with IoT and SoMe!) will ultimately provide a much better outcome over time.

From a practitioner's perspective, the value of the tool cannot be overstated. It has allowed organizations to be far more efficient and more effective overall in improving the analytics and arrive at actionable insights far faster than they would have without the tool. An example of such a tool is one with which a comprehensive database repository can capture data and categorize it into several areas:

1. **Content repository:** Funneling the hundreds/thousands of data sources into a central location.
2. **Content search:** Using Boolean, phrase, truncation or other search mechanisms.
3. **Communication/sharing:** Ability to cross-functionally share this information readily.
4. **Knowledge visualization:** Transforming the data analysis into a useable, easily understood visualization for fast deciphering and application.
5. **Actionable insights/decisions:** Arriving at the actionable insights to make organizational decisions, in the quickest time possible

ANALYSIS AND TAXONOMY

First off, it is important to know what is meant by “taxonomy”. It is the ability to categorize content in the classifications best suited to achieve the intelligence initiative. Think about the objective you are trying to achieve. If it is about a product launch or about how a competitor is performing, there is a set of criteria that you want to establish which acts as a catalyst to achieving the objective. What initial segments of the industry? Geographical areas? Specific products or general applications? How far do you want to go into the detail of what you are trying to determine?

Therefore, the ability to analyze this data with the desired taxonomy is important, but you are not looking for a simple listing of relevant sources for a business need. Rather, the key OUTPUT element is to appropriately analyze the data that allows the user to identify and derive key content which can be immediately adjusted to be included as insights in the Recommendations. Many tools have dashboards that are customizable to user preferences and can be adjusted based on the parameters that the user requires. This is used extensively by many successful organizations and is key to being able to get the data in the right format so that it is easily ported to a Recommendations output.

In addition, people engagement is key here – ensuring that the content driven from the automation is relevant, timely, and actionable. However, you still have to utilize individual perspectives to make sure the dashboard outputs are in line with the company objectives and requirements for the need being investigated.

ORGANIZATIONAL STRUCTURE AND CULTURE

It’s not just the process of competitive intelligence that needs to be modified in light of the new environment; the organization itself will need to be looked at. There are two elements to this. One is the structure itself, in that if the information is to be acted upon timeously, then mechanisms need to be in place to quickly get intelligence into the hands of decision-makers. For example, the idea that the pinnacle of CI is that it is included in the weekly or monthly senior management meetings needs to give way to a real time alternative, possibly daily intelligence updates. There is also the cultural element of an organization. Far too often, senior management will be aware of the content of the intelligence, but will either choose not to act on it or simply ignore it as a “nice to know” sort of factoid. Obviously, both are potentially catastrophic behaviors that will only improve your competitor’s chances of gaining an advantage in the marketplace, especially given the speed of change mentioned earlier.

Therefore, company structures have to be shallow and decision-making has to be quick. Analysis-paralysis has to be avoided at all costs. This can only be achieved, though, when you have a sponsor at the executive level of the organization who values the CI contributing efforts and can therefore prioritize and include the results in the strategic direction of the company.

OPENING UP THE INTELLIGENCE PROCESS – OPEN INTELLIGENCE

With the above ideas implemented in organizations, it becomes more likely that organizations will be able to handle the four Vs of data and the corresponding international and speed components of insight generation. However, there are concerns that with most intelligence units comprising one or two people, it will be difficult for the user to actually cope with frequent intelligence projects integrating massive amounts of data, dealing with a fast-changing environment and incorporating international elements into the model. Not only will it be difficult (as will be pointed out in the next part of this article), but it might even be undesirable. Perhaps a better approach would be to open up the intelligence process.

In the next section we will look at a very popular topic – open innovation, which is the opening up of organizations' innovation activities, including research and development, to people outside the organization – even competitors.

OPEN INNOVATION

Our notion of open intelligence is based on open innovation concepts pioneered by Henry Chesbrough. In 2003, Chesbrough wrote: "Open Innovation is fundamentally about operating in a world of abundant knowledge, where not all the smart people work for you so you'd better go find them, connect to them, and build upon what they can do." He went on to explain: "Open Innovation is a paradigm that assumes that firms can and should use external ideas as well as internal ideas, and internal and external paths to market, as the firms look to advance their technology. Open Innovation combines internal and external ideas into architectures and systems whose requirements are defined by a business model."

Up to this point, innovation was seen as an exclusively internal organizational function: R&D inside the organization came up with the ideas and then the organization determined (again internally) which ones to pursue to the development and commercialization stages. Open innovation implies opening up elements of the innovation process to smart people outside the organization. In 2012, Elaine Watson wrote about Coca-Cola's open innovation program. Coca-Cola's chief procurement officer, Ron Lewis, summed up open innovation and its importance to Coca-Cola when he said, "…Our goal is to be the best at innovation in the industry and the way we're doing that is via an open network. And there is a good chance that the source of such innovation may well come from outside Coke's R&D department. We want to be the best at connecting the dots."

Finding ideas outside the organization and connecting the dots are certainly the objectives of open innovation and definitely areas where CI has a role to play. In a 2008 article in *Harvard Business Review* by Huston and Sakkab on Procter & Gamble's (P&G) open innovation initiative, it was noted that as of 2006, 35 percent of P&G's new products had elements of open innovation, with 45 percent of the initiatives in the product development portfolio having elements that were discovered externally, with a goal of 50 percent of innovation coming from outside the company. P&G even established a policy of licensing new products/technology to competitors if P&G had not commercialized them within three years of development.

Innovation researchers note that part of this opening up is to include parts of the organization that have traditionally not been consulted or included in innovation efforts. For example, Volkswagen, in looking at car engine design, allowed individuals from outside the engine group to bring forward ideas and to become involved in selecting which of these ideas would go forward into the design stage. Hansen and Birkinshaw linked open innovation to each element in the innovation value chain in their *Harvard Business Review* article titled "The Innovation Value Chain". In it they looked at key questions to ask and performance indicators to identify how "open" the innovation process was (Table 1).

In the typical company, virtually all idea generation takes place in-house. To open up the R&D process to other "bright" people, they talk about cross-pollination with other units across the organization providing inputs to R&D and external inputs coming from people outside the organization who also contribute to the process. We have seen examples of this in many industries. We mentioned earlier how Volkswagen opened up its engine R&D to people outside the R&D department. Bed Bath and Beyond, working with "Edison Nation", put a call out for inventors from around the world to provide ideas that could result in new products sold under the Bed Bath and Beyond brand. This went beyond idea generation to the use of an open approach for both idea generation and conversion, with Bed Bath and Beyond doing the diffusion.

After 14 years of research and writing on open innovation (14 years after Chesbrough introduced the topic), with many case studies and papers having been written, it is safe to say that each element in the innovation value chain – idea generation, conversion and diffusion – is taking place through open innovation.

Table 1: Hansen and Birkinshaw Innovation Value Chain (2007)

	IDEA GENERATION			CONVERSION		DIFFUSION
	IN-HOUSE Creation within a unit	CROSS-POLLINATION Collaboration across units	EXTERNAL Collaboration with parties outside the firm	SELECTION Screening and initial funding	DEVELOPMENT Movement from idea to first result	SPREAD Dissemination across the organization
KEY QUESTIONS	Do people in our unit create good ideas on their own?	Do we create good ideas by working across the company?	Do we source enough good ideas from outside the firm?	Are we good at screening and funding new ideas?	Are we good at turning ideas into viable products, businesses, and best practices?	Are we good at diffusing developed ideas across the company?

FROM OPEN INNOVATION TO OPEN INTELLIGENCE

Innovation was opened up because, despite the risks (for example, loss of intellectual property rights), the benefits associated with allowing people external to the R&D unit (both inside and outside the company) to assist with all aspects of the innovation process were too great. Organizations have found that with the speed of change and the need for faster and better innovation, it was beneficial to allow other people to have a role in generating ideas, evaluating them and even helping with commercialization.

Given the complexity and volume of data and intelligence, it is clear that, similar to open innovation, it is time for CI to consider opening up all phases of the intelligence process to deal with similar challenges: the need for quicker intelligence, the need to cope with frequent environmental change, and the need to deal with the complications posed by big data. The ensuing discussion explores how this would work by examining some of the elements of the traditional intelligence wheel.

In looking at open intelligence, some of the language of open innovation from Hansen and Birkinshaw is highly leveraged to CI:

- **In-house:** This will refer to the traditional model of intelligence where virtually all aspects of the intelligence process are done within the CI unit.

- **Cross-pollination:** This will refer to supplementing in-house with input from other units of the organization to assist with aspects of intelligence development.

- **External:** This will refer to supplementing both in-house and cross-pollination with people outside the organization, such as key customers, suppliers, experts, and other stakeholders to assist with aspects of intelligence development.

INTELLIGENCE PLANNING

There are many aspects of intelligence planning that could benefit from open intelligence, but for the purposes of a basic exploration of the concept we will look at one – intelligence topic generation. Intelligence topics are traditionally developed by the person responsible for intelligence, based either on their understanding of management needs or through direct consultation with management. Call this the traditional in-house approach to topic development. In CI we talk about it in terms of "what is keeping the CEO up at night" or "what key decisions are being made".

Cross-pollination (opening up the process to units outside intelligence) involves allowing others in the organization to contribute to the intelligence topic generation process. Personnel in R&D, for example, understand the technical environment well and might have some interesting perspectives on what topics need to be investigated. Those in maintenance or service might have ideas based on customer complaints and the problems they are having.

By adopting an external approach (fully open), you allow customers, suppliers, and other stakeholders to provide inputs for the intelligence topic selection process (possibly even competitors?). Nan Bulger, CEO at SCIP, wrote in a 2015 article about integrated intelligence that the purpose of intelligence is to "help your customers compete in the market and help your customers make money". If the purpose is to make customers more competitive (a business-to-business objective – B2B) or simply to satisfy customers (both B2B and more traditional consumer markets), then would it not make sense to ask them what topics are most relevant to them? Or perhaps show customers the topics you are thinking of covering and ask them which ones would result in intelligence that would help them better position themselves among their customers.

It's not just the generation of ideas around topics that could be done using an open intelligence approach; topic selection could also be done in the following way: we can envision a Delphi approach where people from outside the CI function rank the intelligence topics, thereby helping the intelligence team to determine which ones are more relevant to other units in the organization, to key stakeholders, etc.

COLLECTION

Open intelligence applied to collection is something that, on the surface, CI already does very well. The profession understands the importance of gathering information from broad sources both within and outside the organization. They grasp the need for diverse sources of information. But there are a few aspects of collection that we want to bring up in the context of open intelligence.

First, as a reminder to CI practitioners, the collectors of information should to some extent come from outside the CI unit (in-house). To what extent is information being entered into the intelligence system from other units of the organization (cross-pollination)? And from outside the organization (external)? This is not about where you get the information from, but who is providing it. In an open intelligence environment, information is being directly entered into the system by stakeholders and by people in other parts of the organization.

Open intelligence also requires CI practitioners to extend collection sources in order to recognize data variety. To what extent (where relevant) are online video, social media, and so forth, being integrated into your intelligence efforts? How is the internet of things figuring in your collection plans? Imagine what can happen if you address variety, velocity, and volume. This will no doubt require the use of technology, but with the given rates of change and increased data (and data complexity), this will be necessary. One thing to consider is that, in the world of big data, 80 percent of what is available is unstructured or semi-structured (text, images, and sound). Therefore, some form of unstructured data technology will become important.

ANALYSIS

The traditional view of analysis has the person responsible for intelligence applying any one of several dozen formal analytical techniques to information that has been gathered. This is a straightforward and logical process, which fits with the in-house view of intelligence. We have added to this in the earlier section by mentioning some online/technological analytical tools, but it's still conceptually about the CI unit engaging in the analysis and then sending the results with recommendations to the decision-makers. A few things that we have seen over the past several years have caused us to question whether this should be changed to incorporate the open intelligence approach.

The first was a presentation by Johan van Zyl, CEO of Toyota Europe NV/South Africa, on the Toyota South Africa intelligence system. During the presentation he talked about how the client for the intelligence joins with the intelligence team during the analysis phase. This provides the intelligence team with client insights and perspectives on the data. We have also seen various foresight initiatives where experts from around the world were invited to provide analytical input either as part of expert panels or in Delphi approaches to help organizations make sense of complex environments. In this regard, Volkswagen provided a very interesting open innovation example. They set up a virtual exchange where participants from throughout the company received play money that they could use to "bet" on what they thought were the better ideas. Whichever idea attracted the most "virtual money" on the exchange was the one selected.

There are two aspects, then, to think about in applying an open intelligence approach to analysis. The first is who you open the analysis process up to (who is invited in?) and the second is the kind of analytical techniques you use to integrate broader involvement. An in-house (call this closed) approach involves having only the intelligence unit conducting the analysis. Cross-pollination would involve allowing others inside the organization to participate in the analysis process, while external would involve inviting into the organization outside experts, stakeholders and others. For cross-pollination and external initiatives, traditional analytical techniques would be combined with techniques such as Delphi and expert group approaches. The foresight field has a lot of techniques that can be used to integrate broad groups into the analysis function.

A final aspect of analysis, which ties in with the concept of rapid change, is the frequency of analysis. As mentioned in the collection section, organizations will need to refresh and reanalyze their data on a frequent basis. Automated analytical approaches (software and other online tools) will become increasingly important in view of the need for more frequent data refresh rates, broader data types, and more frequent analysis.

COMMUNICATION

Traditionally, intelligence – after being developed by the intelligence unit – is given to the client. There are variations in this approach. One would be giving the analysis but not the recommendations (the true intelligence) to other managers in the organization. Another would be making the non-sensitive information gathered for intelligence more broadly available throughout the organization. However, generally it's about targeted intelligence being developed and (due to its sensitivity) given to those with the authority and specific need for it, on a need-to-know basis only.

The open innovation groups have discussed at great length the sensitivity and concerns surrounding sharing intellectual property more broadly than just in-house (in the R&D unit), but have generally concluded that despite the risks, the potential benefits are big. Similarly, there will have to be discussions around how broadly intelligence should be communicated.

Under the cross-pollination approach, intelligence results could be shared with others in the organization (besides the client) but perhaps only with those who have appropriate security clearance levels. Under an external approach (full open intelligence), the intelligence would be shared with trusted stakeholders outside the organization. This is certainly done in the government intelligence environment (within the five eyes community, for example (Australia, Canada, New Zealand, the United Kingdom and the United States), and it may make sense to share intelligence findings with key customers or suppliers to get their perspectives on the intelligence. Again, this fits with the integrated intelligence concept but, more importantly, provides an additional level of validation of intelligence results and helps to provide unique perspectives as well.

Case Example

The following is an example of several of the ideas mentioned in this article. In the interests of confidentiality, the company, industry and technologies are not described in detail.

An organization was tasked with looking into market sizing and competitive information within a specific geography. In order to be most effective, the following steps were taken:

1) Objective identification

This is a very important part of the analysis – to specifically define the key objectives in terms of what knowledge is required to satisfy the company need. It often happens that organizations are vague in this area and end up trying to get data on everything, leading to unclear results and un-actionable conclusions. It is critical to ensure that management has the right expectations and can review the actionable aspects in the results against these expectations. Note that this is similar to how projects are defined today.

2) Data gathering

This is where several techniques are applied. Of course, traditional primary and secondary research is a given, but utilizing social media (SoMe) provided very data-rich content. Social media is seldom pursued in traditional CI modeling because people either don't understand the environment or are unsure how to tap the golden nuggets that might exist in amongst all the noise. Various listening/trolling techniques, targeted posts, specific industry-based/regional-based campaigns, etc. were employed, which provided very useful data. The key was for the SoMe initiative to be well managed and structured appropriately.

In addition, utilizing alliances (channel partners, technology partners, vendor and contractor relationships) provided a wealth of information which also contributed to the data collection and analysis processes. This allows you to compare your company's products/services with those of your competitor's by talking to individuals who make use of both.

Finally, additional information was gained through direct engagements with competitors via a technology forum, industry event information and related activities.

All of these techniques really exemplify the theme of open intelligence – the ability to go beyond the traditional data collection approach to one involving tapping any and virtually all sources internal and external to the company, where content can be extracted. This part of the case example brings in data from multiple sources (the four Vs) and addresses international dimensions by using various industry forums. Note that full open-source stakeholders were able to input information into the process.

3) Analytics

Given this wealth of information, specific Knowledge Management Tools were utilized on a real-time basis to provide dashboards of content relative to the objective(s). This was another critical component of the CI modeling, with tool usage doing all of the heavy lifting of data analytics and the taxonomy greatly reducing the Time to Insights in the project.

It is important to note that another key element during this entire process was that the data findings were continuously reviewed by stakeholders and senior management to ensure that there was congruence with the defined objectives. Sometimes the objectives were adjusted in line with the direction of the findings. Unfortunately, many organizations wait until the final results are produced before they conduct this review process. In this case, to avoid this problem, a cyclical find-analyze-review-adjust format was repeatedly used to ensure that any adjustment and changes were done in-process. This cut a great deal of time from the overall Time to Insights process. Allowing management (internal) and stakeholders (external) to review findings and provide feedback on them during the analysis phase is an open intelligence practice.

4) Recommendation

Because of this efficiency in the cyclical in-process review methodology, a great deal of information was obtained and actionable insights were achieved within only a few weeks (albeit not real-time, but certainly not the two-month timeframe that the process would normally take). In fact, the Time to Insights dropped by approximately 60 percent, while increasing the value in the data obtained through these open intelligence practices.

CONCLUSIONS

Speed of change, the need to address international dimensions of business and information, and the growing complexity of data (volume, variety, velocity, and veracity) will require a rethink and possibly a reconceptualization of how we develop intelligence. Our concept of open intelligence, which is inspired by the popular and growing field of open innovation, offers an approach to address these challenges. However, it will require that the competitive intelligence function opens up and involves input and assistance from others in the organization (cross-pollination) and at the most open, from others outside the organization (the external approach).

Table 2 provides examples of this within the domains of planning, analysis, and communication. This may make some intelligence practitioners nervous because the intelligence will potentially be seen by some unintended people (at least as far as the intelligence practitioners are concerned), but this is no worse than the potential loss of IP in the case of open innovation.

Table 2: Open intelligence – Examples within the wheel of intelligence

	Traditional model (in-house/CI unit)	**Cross-pollination (across the company)**	**External**
Planning: Where the topics come from	Senior management-driven: What's keeping them up at night? CI practitioner-driven: We know what's needed.	Other parts bring forward and help to select the intelligence topics – they know what the key issues are from their unit's perspective.	Key stakeholders have a unique perspective on the environment. What's important to them? What do they need to be competitive?
Analysis: Techniques and methods	Our unit knows how to make sense of the information. Craig Fleisher and Babette Bensoussan have shown us the techniques.	We still need Craig and Babette, but let's have others from the organization help us make sense of the information. We will need group analysis approaches, such as exchanges and Delphi.	Who are our five eyes for intelligence? Let's harness the power and insight from key customers, suppliers, other allies, experts, etc. We will need group analysis approaches, such as exchanges and Delphi.
Communication	The intelligence is provided to the client on a need-to-know basis.	The intelligence is shared with those in the organization who could provide perspectives on it and are cleared to see it.	The intelligence is shared with key people outside the organization who can provide perspectives and whom we trust to see it.

Many of the world's largest companies have adopted aggressive open innovation strategies and established open innovation programs. It is only by harnessing the information from broader networks (open intelligence), involving a broader array of experts in analyzing information (open intelligence) and sharing the intelligence with appropriate stakeholders (open intelligence) that organizations will be able to deal with the unprecedented rate of change and the increasing complexity of data discussed in this article. Even planning (including intelligence topic selection) can benefit from an open intelligence approach.

To paraphrase Henry Chesbrough, your CI unit does not have all the smart people in the world working for it, but don't you wish it could? Put another way, do you really feel that intelligence in a closed environment (in-house) is better than open intelligence with the combined information, analytical capability, and insight of a broader expert group? The idea with open intelligence is to get the best minds working for you; those that could provide immense value to you.

If open innovation does not appeal to you, then how do you propose dealing with the challenges that we have highlighted in this article?

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Customer Intelligence Meets Trade Show and Event Intelligence

Competitive Intelligence Magazine, July–September 2015

Peter Drucker once said that "the purpose of business is to create and keep a customer" (Stern]2011). Drucker advocated this in 1954 in his seminal book, Practice of Management. Yet I have seen and read much that suggests that many companies still do not fully understand this. For example, in reporting why Monitor Corporation (founded by Michael Porter) filed for bankruptcy protection, Forbes reported: "Monitor was crushed by the single dominant force in today's marketplace, the customer" (Denning, 2012).

In the analysis of what caused the failure of Nortel, one of the largest telecommunication companies in the world, it was noted that a lack of "true" customer understanding played a significant role in its demise and that, in the end, customers decide whether you succeed or die (Calof et al. 2014). In contrast, Apple certainly understood the importance of Drucker's philosophy. In 1997, Steve Job spoke about his "customer first" strategy, stating that "you got to start with the customer experience and work backwards to the technology" (Purcell 2011). This all speaks to the importance of, and the need for, a customer intelligence program, which is the topic of this issue's column. As readers will learn, there really is no better place than a trade show to engage in customer intelligence.

What is customer intelligence? In his book, Customer Intelligence (a good read for those interested in the topic), Kelly (2006) describes the field as "the knowledge that an organization has concerning the likely future intentions of prospective customers". Wikipedia applies a more process-based definition to it (something more akin to SCIP's definition of intelligence): "Customer intelligence (CI) is the process of gathering and analyzing information regarding customers, their details, and their activities in order to build deeper and more effective customer relationships and improve strategic decision making" (Wikipedia).

Why are trade shows great places for customer intelligence? The simple answer is that customers, both existing and potential, are there. But so, too, are others who can help you better understand these customers, including association personnel, government officers, consultants, suppliers, and even your competitors. The next section provides some in-depth views on how each of these groups can be used to help you develop customer intelligence.

Customers: If you want to know what customers want, they will tell you – both directly and indirectly, at your booth and at theirs. Every time they ask your booth staff about product or service attributes ("Does your product/service do…. "), they are signaling those factors that may be important to them. Noting all these product/service questions and analyzing them using word-mapping software (or other analytic packages) will help you understand what they want. Booth personnel and others at the show can either passively write down what customers say they want, or they can proactively ask customers what product/service attributes they are looking for. Furthermore, as I have learned from studying the best practices of leading companies, asking the customer (existing or potential) why they are asking about these attributes/functions will help you to better understand what is driving the customer. Note that I am not advocating giving customers what they are asking for, but understanding what they want.

Do you want to test the strength of your company's brand or customers' attitudes towards your company/ products/services? Consider running sentiment-analysis software over the comments that you and your organization's booth personnel gather at the event. One of my past columns dealt with analytics at trade shows. It will give you useful ideas on how to better analyze the wealth of customer information collected at events in order to turn it into valuable customer intelligence (Calof and Richards 2015). Davenport et al. also wrote a great article on customer analytics called "Know what your customers want before they do", which those interested in this area should read.

One big piece of advice if you are going to try to do this at a show (that is, gather customer information such as the types mentioned above) is that you will need to ensure that all booth personnel gather and "record" the information consistently. Coding procedures, forms, and perhaps an app for booth personnel tablets or phones must be used for this information to be gathered consistently and accurately.

But let's be even more proactive, where your customer intelligence efforts are concerned, than simply noting customers' comments and concerns. Why not try and find out more about what their future plans are, what they are developing? Why? So that you can start looking at ways in which you can feed into these future plans. Depending on the industry that you are in, lengthy R&D, testing and so forth may be required, and this takes time.

Here are a few examples of what you can learn from customers at events:

- What are they looking for in products/services?
- What are their needs?
- What changes are they planning to their products/services/strategies?
- How do they view the future of the industry, and how do they plan to deal with it?
- What problems are they having? What are their pain points?
- What opportunities do they see in the industry? What help do they need going after it?
- What am I seeing at the event that I can use or develop to make my customers more competitive?

Competitors: Competitor-related KITs are popular among SCIP members at events, according to research studies, and certainly trade shows are great places to conduct them. But, under the customer intelligence concept, I am asking you to also look at competitors from the standpoint of what their perspective is on their customers. What do they know about them that you don't? Each competitor strategy reflects an assumption about how best to compete, based on their understanding of the customer.

In terms of who to specifically target for this type of customer intelligence type or intelligence topic, listen carefully at your booth and around the show regarding which competitor(s) customers and others talk most positively about. For this KIT, note not only the name of the competitors who are being mentioned but also which of their specific attributes are being mentioned most often, as this will help you learn, once again, what customers are looking for and which competitors may best recognize this. Word-mapping and sentiment-analysis type software will help with this intelligence task as well.

Consultants, association personnel, government, academics, and others: There are many other people at a trade show that you can talk to who interact with customers, study them, and understand them. For example, associations that represent your customers (existing and potential) are responsible for understanding them and their needs. Government agencies/departments that may also be at the show are responsible for developing programs and policies to help these customers, and therefore should be able to provide valuable information for your customer intelligence program. These groups (government and associations) interact with your customers on a regular basis and have no doubt conducted studies on them. In fact, when looking over the show guide to see who has exhibits, who is giving talks/seminars, and who is hosting events, you should be asking yourself, what knowledge does each have about customers? How can they help my customer intelligence program? There is a wealth of information at the show about customers when you look at it from this perspective.

To wrap up the first of several articles I will be writing about customer intelligence, I want SCIP members and others to take the Drucker challenge. As mentioned at the beginning, it was Drucker who, so many years ago, said that the "purpose of a company is to create and keep a customer". In this sense, everything else that a company does – marketing, R&D, product development, and even competitive intelligence – is in reality designed to support a company, in Drucker's eyes.

Those companies that best understand the customer, that have the ability to develop the products and services that meet the customer's true needs and make them more competitive, can win in the marketplace. Developing this understanding is clearly an attribute shared by many of the more successful companies and, as this article has emphasized, trade shows are probably one of the better places to develop customer intelligence. It's time to start developing your world-class customer intelligence program!

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Section 4:
Special Topics

Intelligence and Sales: The Role of Trade Shows

Competitive Intelligence Magazine, Winter 2019

The primary focus of much of what I have written about trade shows is the ability to use them (the venue/location) to accomplish your organization's intelligence objectives. Trade shows and other events, as I have frequently said, provide more than just sales opportunities. Nevertheless, they are important for sales.

Accordingly, this issue's column focuses on the sales side of intelligence at conferences and trade shows: how intelligence can be used to maximize the potential to make sales both at and after the trade show. It is about how to use the intelligence process to develop the needed customer insights to make sales happen. The article is written from the perspective of those who are staffing the organization's trade show booth, those who are tasked with making sales happen –something that I have had the opportunity to do on many occasions!

To set the context for sales and trade shows, I am going to quote from two comprehensive reports on trade shows, which readers are encouraged to download so that you can get even more insights into trade shows. The first is the recently released 2018 Attendee ROI Playbook from the Center for Exhibition Industry Research (CEIR). The second is a 2009 report written by Tradeshow Week which looked at "the value of conventions and trade shows today". Both take comprehensive looks at trade shows from the perspective of exhibitors and attendees.

To be clear, attendees do go to events with buying on their minds. The recent CEIR report drives this home, noting that 97 percent of attendees go to these events with shopping-related objectives (see Table 1). However, only 36 percent plan to make a purchase at the show. The 36 percent who are at the show to make purchases have likely already done a lot of their pre-purchase homework, while the other 61 percent are at the show as part of their looking-for-a-solution phase of their customer journey (more on customer journey later). Ten years before the CEIR report, Tradeshow Week had similar results, with 23 percent of the attendees saying that they planned to make a purchase at the event.

> ***"According to the attendee survey respondents, 49 percent of attendees or their companies take less than three months to place an order with an exhibitor they met at a show. Owners, CEOs, and presidents make quicker purchase decisions, as 61 percent said they buy from at least one exhibitor within three months of the show… Eighty-eight percent of attendees said they consider conventions and trade shows to be an important part of their product sourcing and buying process."***

From the exhibitor side, Tradeshow Week reported that close to 40 percent of the exhibitors responding to the trade show weekly survey said that it took at least a year to close on sales from event leads (see Table 2).

Table 1: Motivation for attendees attending (25 reasons given to respondents)

Category	Specific motivator	% of attendees listing this reason
	To make a purchase	36%
Shop (97%)	See, experience new technology	84%
	See, experience new product introductions	82%
	See, touch, interact, experience new products	81%
	Ability to talk to experts	79%
	Idea generation/planning	75%
	Build/maintain relationships with suppliers/exhibitors	71%
	Brand comparisons	66%
	Gather information for upcoming purchase	65%
	Have my questions answered	64%
	Other: Prospecting for suppliers; finding a solution to an existing problem; meet actual product users; influence with product designers to make a purchase	
Learn (96%)	Keep up to date with industry/trends	87%
	Professional networking	76%
	Personal development	75%
	Better job performance	68%
	Other: Seminars; speakers for continuing education credits; CMEs, etc.	
Other categories: Experience, value, prestige, logistics	To get inspiration/to be motivated/to recharge	66%
	The reputation of the event	68%
	Other: Participate in membership activities, such as chapter meetings; convenient location	

Source: Attendee ROI Playbook, Center for Exhibition Industry Research (CEIR) (2018)

Table 2: How long after the show exhibitors close sales from show leads

Period	% of exhibitors
Less than 3 months	14%
3 to 6 months	17%
7 to 11 months	19%
12 to 18 months	29%
19 months to 2 years	10%
Over 2 years	2%
Don't know	9%

Source: Tradeshow Week

It is interesting to note that the dual key motivators for attendees going to a show (shopping and learning) have remained virtually unchanged for many years.

> ***"CEIR has monitored motivations for attending an exhibition since 2000. The top-ranked priorities remain remarkably the same, with most professionals bringing two goals with them: shopping and learning. It is a longstanding trend that the top-ranked motivations for attending are seeing and experiencing new technologies and new products, and keeping pace with the latest industry trends. Face-to-face (F2F) interaction with experts and peers is also of high importance."*** **(CEIR 2018 report)**

The Trade Show Industry: Advice for the Booth

Given the importance of trade shows to the buying process of exhibitors' customers, it is not surprising that industry experts have focused on providing advice to exhibitors so that they can, in a sense, make it easier for potential customers (attendees) to buy from them. World exhibition experts, such as Barry Siskind, have long written about how to design booths for maximum effectiveness, how to manage the booth to enhance sales opportunities, and even how to train booth personnel to ask the right questions. I encourage readers who are interested in maximizing trade show ROI to read one of Barry's many books and articles. Barry's advice fits nicely into the intelligence field – so much so that Barry and I have run several seminars on maximizing trade show ROI under the title, "Trade shows: Inside and outside the booth".

Barry writes about the need to profile those who go into the booth and to develop an appropriate response to them. Some of those who visit the booth are not really interested in buying – they could, for example, be competitors looking for information on you or attendees simply interested in your swag (giveaway). Some actually are potential customers. If this is the case, the idea is to quickly identify these potential leads and move them efficiently through the buying process. Barry has great advice on how to quickly identify the objective of those who visit the booth and deal appropriately with them. He even offers advice on how best to reach out to attendees based on their age:

> ***"Exhibitors need to know that the way to approach Gen-X is different than the way to approach baby boomers. Gen-X's are comfortable online; by the time they get to a trade show they already know about the exhibitors at the show, have read reviews, and asked online (via Twitter, Facebook, etc.) if anyone knows about them… I see a lot of companies moving away from talking about products and service and using the shows more as a tool to engage clients to discuss issues, problems, solutions that are beneficial to both, instead of just a sales pitch."***

Barry also offers sound advice on how to ask attendees the right questions at your booth so as to enhance the possibility of sales. In Exhibitor Online, Barry Siskind was asked to respond to the following question from an exhibitor:

> ***"My booth staffers are well versed on our products and company, but when it comes to opening a conversation with strangers at trade shows, they're completely tongue-tied. What questions should they ask to get the conversation started?"***

Barry replied:

Don't ask a question that leads to a sales pitch; Don't ask a question if you don't want – or care about – the answer; Don't ask a question if you don't know what to do with the answer; Start on common ground; Give visitors an easy way into the conversation; Make it about them.

I encourage readers to download the article and study the details on each of these recommendations.

From an intelligence perspective, the advice contained in Barry's recommendations and others in the trade show industry is:

1. Before going to the show, develop a profile procedure for those who will be visiting to your booth.

2. Before going to the show, develop response strategies for your boothers (those manning the booth) to action, based on the profile identified. This needs to be done consistently.

3. Before going to the show, train all those who will be in the booth on interview techniques (how to ask the right questions).

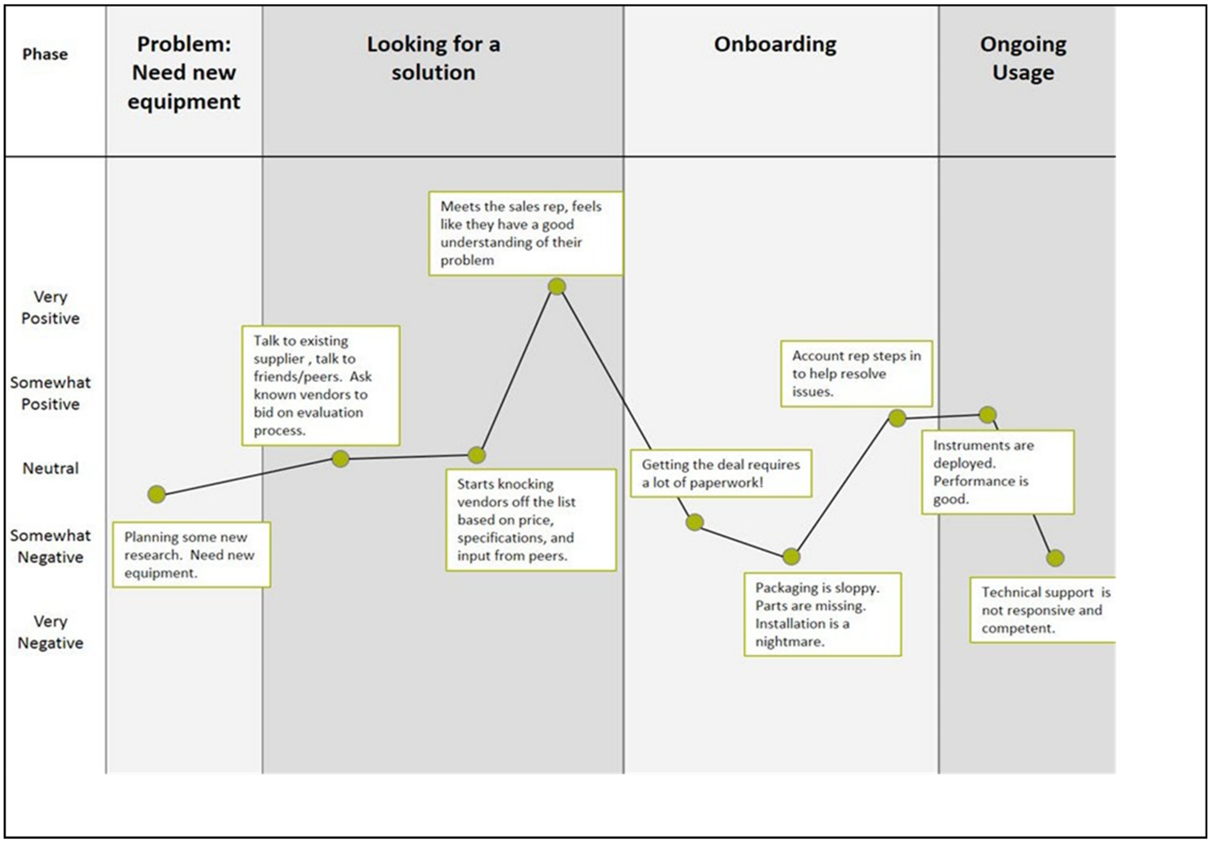
The Competitive Intelligence Industry: Advice for the Booth

In the October/December 2015 issue of Competitive Intelligence Magazine, Jana Sedivy and I wrote about customer journeys and journey maps. A customer journey recognizes that the actual purchase of a product/service is but one step in the process. Sales experts talk about the sales cycle. Customer journey experts similarly talk about a cycle, but one that continues long after the purchase has actually been made.

A customer journey divides the process into four stages: (1) experiencing a problem/looking for an opportunity; (2) looking for a solution to the problem/opportunity; (3) onboarding (after they have made the purchase and before they start using it); and (4) ongoing usage. Bad experiences in onboarding and ongoing usage will impact subsequent purchases. Table 3 graphically presents a journey map. Think about this from a sales perspective. The 36 percent of attendees who, according to the CEIR report, went to the show to make a purchase have already been through stage 1 (experiencing a problem/looking for an opportunity). They are likely well along in stage 2 (looking for a solution to the problem/opportunity) and, depending on the experience they have had with you or with your competitors, have a predisposition based on stages 3 and 4 (onboarding and ongoing usage), which will shape what they are looking for from a potential supplier in terms of the overall relationship.

For the 64 percent who will likely be buying from someone after the show, they are somewhere on the journey; how you approach them and what you tell them in your booth will impact how far they go on the journey with you. Clearly, this confirms the earlier advice about the need to profile those who enter your booth. This is also where capturing the right information about the attendee visiting your booth could be crucial for post-show follow-up. It could lead to a high-potential sales lead or, conversely, result in a turned-off customer.

Table 3: Customer Journey Map – an example



Generally, a customer journey provides a lot of event intelligence opportunities. The following is taken from my article with Jana.

- ***Experiencing a problem/looking for an opportunity.*** Elicit information from customers or potential customers about their future plans while they are at your booth or you are at theirs.

- ***Looking for a solution to the problem/opportunity.*** Trade shows are a great place both for identifying customers and potential customers looking for a solution to the problem/opportunity and learning more about the stages they are going through, and also for talking to the experts/friends they talk to (who write in social media) about what they are saying about you and your competitors.

- ***Onboarding.*** At trade shows your customers can tell you about their experience with your organization's and your competitor's onboarding processes. This can help you improve your onboarding process, or at least you will find out what you need to do regarding onboarding to satisfy the customer/potential customer.

- ***Ongoing usage***. Talk to existing customers at the show. Ask them about the best experiences they have had with ongoing usage and the worst. This is also where sentiment-analysis and word-mapping software are important as these analytical tools can help you understand what the customers are saying.

Competitive Intelligence: Advice for the Booth – Talking to Customers

The advice laid out above places much of the onus on boothers to talk to customers at the booth in order to identify who they are and at what stage they are in the buying process. But competitive intelligence has more advice to boothers on how to increase sales.

A July 13th 2018 trade show article titled "Top 7 Reasons to Exhibit at Trade Shows" lists as reason #1: sales and lead opportunities, and #7: listen to customer feedback. The advice provided so far has been to help with #1 (identifying sales and lead opportunities). Advice for #7 (listening to customer feedback) would be to help with understanding and hopefully improving the customer journey.

However, there is another reason to talk to customers. It is to help your organization sell better, and the technique is called win/loss analysis. The trade show, and your booth in particular, is a great place to talk to customers who have bought from you (the win) and those who turned you down (the loss). This is your opportunity to learn why they acted in the way that they did. It's a great opportunity to listen (emphasis on listen and not argue, explain away, etc.) to your customers and lost customers as they explain what they think about your company, your products/services, their experience with you, and so forth. Look for frequently occurring words that come up in conversation, and what they relate to. This may also be where word maps and sentiment analysis of what is said at the booth become critically important. Remember, you are there to LISTEN AND LEARN.

Competitive Intelligence: Advice for the Booth – The Customer Profile Before, At and After the Show

I hope all the sales-related advice given above about profiling customers (existing, potential, those going to your booth) shows you how crucial this is. But what goes into such a profile? What do you need to collect to increase the probability of making a sale?

Fortunately, competitive intelligence has advice for you. This article has already mentioned the need to know where the customer is in their journey, their past experience with you, competitors and others, and so forth. Add to this their pain points. I like how Nan Bulger, the past CEO of SCIP, defined competitive intelligence in terms of putting your customer at the center of your intelligence efforts. It's about making them more competitive and more satisfied, and certainly the questions you ask around the profile you are developing on them will help you do this.

However, to make the sale requires more than just knowing where they are in their journey and their pain points. It also requires having knowledge of the buying process of the organization, what drives it, and how purchase decisions are made. I have lots of stories about the right product/service not being bought by the potential customer simply because the sales pitch didn't recognize the organization's process. For example, do potential suppliers need to be ISO certified? Do they need to have complementary systems for integrated ordering from the customer? The trade show provides a unique opportunity for your boothers to find out more about how the particular customer's organization buys products and services.

There is another part of profiling that you may need to consider as well – the expression "qualified trade lead" has always intrigued me. The idea relates to: Is it the right kind of customer, the right potential sales size, and so forth? As part of the profiling, boothers need to know what the company is looking for in terms of who is a "good customer". One of the more frequent intelligence projects that have been proposed in my competitive intelligence mentoring program is finding the right customer/prioritizing customers and markets.

All this points to the fact that boothers need to have a profiling template to fill in on those who visit them at the booth to help qualify the attendee, figure out how best respond to them, and help determine the most appropriate way (including the message) for post-show follow up. If possible, it would be great to have already filled out elements of the profile for those attendees who you know will be at the show, whom you have targeted to meet or who are already well into the customer journey with you.

Let me tell you a story about the better profile advice. A few years ago, I was at a trade show trying to help my client identify products to buy in the future. It was about laying out a purchasing road map for the next 10 years for a client who would be buying millions of dollars in equipment. This client is also an influencer in the industry. I went to a potential supplier booth and asked a very nice and knowledgeable salesperson a lot of questions. I explained why I was there – that the client would be purchasing millions of dollars in equipment over the next 10 years, but needed to know the future evolution of the product. She was a mine of information and generally very pleasant. I left the booth favorably impressed and looking forward to the follow-up information she promised me.

A month later, I got an email from a salesperson from the company but not the one I had dealt with at the show. The email started with a friendly introduction noting that I had visited their booth and talked to another salesperson (so far, so good). The salesperson asked me what I was buying now and how they could help me. My response was that I was not buying now, but I was recommending to my client what to buy in the future (I had told the salesperson this). I mentioned that it was part of a foresight procurement program. I had to restate everything I had said at the booth (this did not make me too happy). The company salesperson replied with another email (frankly, a rude one) that demonstrated a complete lack of knowledge of the client, their needs and their buying process. Suffice to say that the undertone of this person's email was that I was wasting his time.

This experience was not a good one. I did not have the information that I had been promised. Based on this experience, my client will likely never buy from that exhibitor. The concern, of course, was that if they were this bad at the sale, imagine how bad they will be post-sale. This all could have been avoided if the boothers had profiled me and my client properly, identified where I was (the client) on the customer journey (at the beginning), asked the right questions about the purchasing process criteria and who was involved, and then passed on the profile to the appropriate person in the company to help us on our journey.

Competitive Intelligence: Advice for Those Who Design the Booth

Here is where my experience and history in trade show management come together with my experience in trade show intelligence. Getting the right people to your booth depends on many of the factors listed in this article, but it also requires the right messaging (both on the booth and in social media before and at the show), the right booth design and even the right marketing collateral. Trade show experts write a lot about this. So, next time you are at a show, look around to see what works (and what does not). What are the trends? Talk to people whose booths are attracting the kind of people you are interested in. Talk to people who visit your booth and ask what brought them in. Develop the insights needed to enhance the possibility of getting the right customer into your booth.

A quick story: I once took a bunch of companies to a trade show in Japan. Traffic at their booths was sparse and they did not know why (I knew why). After a day and a half, I asked if they had gone to the Japanese pavilion to look at the Japanese booths, to learn how the local experts position themselves and their booths for the local market. I then had a local (Japanese expert) take them to the Japanese pavilion where they learned, among other things, that Japanese branding and messaging in this industry were very different than what they were used to in North America, and that booth design was also different. The companies will be more competitive next year.

CONCLUSION

According to the Center for Exhibition Industry Research (2018), 97 percent of those attending trade shows are there to shop. While only 36 percent will put in their orders at the show, almost all attending said that the show was crucial in their purchasing decisions and many would be purchasing something from an exhibitor after the show. Eighty-eight percent of attendees told Tradeshow Week that trade shows and conventions were an important part of their product sourcing and buying process. This all means that pre-show intelligence is needed so that you can identify the best potential customers to go after at the event. It is needed to figure out where those visiting your booth are on their customer journey and how best to approach them. It is needed to figure out how best to sell to the attendee and their organization.

Some of this can be gathered before the show for better targeting of prospective leads at the show, and some of it needs to be gathered at the show to help with post-show lead follow up. All of it, though, requires a lot of attention pre-show to develop appropriate profile methods, forms, and training for booth personnel in terms of how to ask the right questions. It’s about developing appropriate systems so that sales leads can be maximized at the show, so that you can be one of the 36 percent who realize a sale at the event and generate great leads that will result in sales success after the show.

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Customer Journeys and Journey Maps: An Exciting New Concept for Intelligence Teams and Trade Show Intelligence

with Jana Sedivy

Competitive Intelligence Magazine, October–December 2015

The customer journey is an exciting new concept that is attracting a lot of attention. A recent webinar on the concept given by Jana Sedivy (one of this article's authors) in December 2015 had over 500 attendees. IBM recently put out two papers on it (IBM Silverpop 2015; IBM 2015). In their study, IBM reported that companies they had looked at were planning to increase spending across every stage of the journey by an average of 50% over the next two years (IBM 2015). Consulting firm McKinsey has spent more than six years studying consumers' decision journeys, while even Harvard Business Review has focused on the concept of customer journey (Edelman and Singer 2015).

What is a customer journey? IBM Silverpop summed it up the best with the following definition: "A customer journey (or buyer journey) encompasses all the steps users, prospects or customers go through in engaging with a company as they consider a product or service and then become users of these products and services." All of these interactions make up the customer journey, the visual representation of which is called a customer journey map. Proper development of the customer journey map and management of the customer journey (the entire experience) have been linked to "enhanced customer and employee satisfaction, reduced churn, increased revenue, lowered costs, improved organizational collaboration and competitive advantage" (Rawson et al. 2013). It's no wonder that, as mentioned earlier, IBM found that companies are significantly increasing investment in all aspects of the journey.

The intelligence opportunities inherent in the customer journey are significant. By definition this is about understanding an important aspect of your external environment (the customer) and everything they do both in becoming a customer and when they are a customer. It's about making recommendations to the organization on what to do to enhance the journey, both in terms of changes inside the organization (all the touchpoints) and the management of information and opinions that can impact the company's brand externally (this will be described in more detail later). These are definitely intelligence-related challenges. Furthermore, trade shows and other events provide great opportunities to collect the information needed to develop, enhance, and validate the map given that these are places where customers, both existing and potential, are in attendance in great numbers and, as mentioned in earlier columns, places where these people are eager to talk about their needs, experiences and concerns.

DETAILS ABOUT CUSTOMER JOURNEYS

This article began with an overview on customer journeys. To help intelligence professionals plan the intelligence needs around understanding and mapping the customer journey, a more detailed description of the journey is provided here. The starting point is to understand that there are several different phases in the journey which need to be understood and mapped.

Experiencing a Problem/Looking for an Opportunity

People buy products or services because they have a problem, and they believe that investing in a product or service will fix it. They also look for new products or services when they are looking for opportunities or expanding their operations. Understanding what triggers the search for a solution is essential to understanding what drives purchasing decisions. In the first phase, customer journey mappers look for signs that would indicate that customers (current or potential) are going to be looking for solutions. It is to do with knowing what the client wants before they have articulated the need. Intelligence professionals want to know about customers' needs before they put out a request for a proposal; before it's articulated. Therefore, understanding and mapping the first phase of the customer journey can be key in getting a head start on the competition.

At trade shows, it's about eliciting from customers or potential customers their future plans. Last year, one of the authors of this article was at a trade show looking at future equipment developments to identify potential acquisitions 5 to 10 years down the road.

Looking for a Solution to the Problem/Opportunity

Although the specifics will vary by industry and product, every purchasing decision begins with a "Let's see what's out there" step. Here, customers will often encounter their first touchpoints with your organization. They will visit your website, download some whitepapers, make inquiries at a trade show, talk to sales reps, and notice you on social media. In many business-to-business ecosystems, a key part of this step involves customers inquiring within their professional network of colleagues, which means that creating customer advocates will play an important role in getting on the radar for your potential customers. In business-to-consumer industries, advertising and social media might play a more prominent role.

What are the signs that customers or potential customers are looking for new products/services? They are visiting different parts of your website that they normally do not visit. They are asking you questions that indicate they are looking for a solution. (In both cases, analytics would be most helpful.) But they are also talking to others outside your organization, and examining or participating in social media conversations about acquisitions. For example, the chief technology officer (CTO) of a leading mobile phone company, looking at acquiring new equipment (in the hundred-million-dollar range), talked to one of the authors of this article about conversations they had had with CTOs of other mobile phone companies around the world on their experiences with the particular telecommunication equipment vendor.

Once again trade shows are a great place for identifying customers and potential customers looking for a solution to the problem/opportunity and learning more about the stages they are going through, and also for talking to the experts/friends they talk to (who write in social media) about what they are saying about you and your competitors.

Onboarding

Once the customer has made the decision to purchase your product, they go through another series of touchpoints to make the purchase, receive it, and then integrate/use it within their organization. These touchpoints involve things like salespeople, online shopping carts, and/or accounts payable. They can involve shipping and quality control upon receipt (and the frustration when the wrong item and/or the wrong quality is received). Customers also go through an onboarding process which (for complex technical products) can involve installation, testing, training, and so forth. For consumer products, the onboarding process is usually brief but no less important, because this is where critical impressions can be made.

The onboarding touchpoints involve the customer interacting with various parts of the organization, which means that for the intelligence professional there are numerous sources within the company who can provide you with information and insights into customer reactions to the onboarding process. At trade shows, your customers can tell you about their experience of your organization's and your competitor's onboarding processes.

Ongoing Usage

Once the customer has purchased the product (or service) and has been on boarded, ongoing usage commences. Does the product deliver the value promised? If the customer encounters difficulties, is it straightforward to resolve them with your company? Ongoing interaction with your company and regular updates from your company's sales staff, senior management, and technical staff are part of ongoing usage. Customers' experiences at this stage can determine whether or not they will become customer advocates or detractors, which will profoundly affect other potential customers who are just beginning their own journey and can impact whether existing customers will buy from you again.

Back to the mobile phone company example: the CTO and the organization's chief procurement officer talked about problems in the ongoing relationship with one of their telecommunication suppliers and not making future purchases from that supplier. Another customer talked about a meeting with the supplier's chief executive officer, which was particularly unsettling and caused the customer to question the supplier's long-term viability. In another project, one of the authors of this article was told by a customer how they had rejected an existing supplier's bid on a $50 million service request because of problems with the relationship that they had in the past.

For trade show intelligence teams, identifying ongoing usage experience from existing customers should be relatively easy to accomplish as they will willingly talk about it, both at your booth and elsewhere at the show. In addition, finding out best practices in ongoing usage should be easy. Simply ask the customers about the best experiences they have had with ongoing usage. This is also where sentiment-analysis and word-mapping software are important as these analytical tools can help you understand what the customers are saying.

MAPPING AND MANAGING THE JOURNEY

After gathering the information and developing the intelligence related to each stage of the journey, the next step is to map the journey and the customer's experiences/sentiment at each stage. What steps do they go through at each stage? What has their experience been? What problems are they having? Concerns? This is the kind of intelligence that is required to map the journey. Figure 1 presents a customer journey map for a B2B product and Figure 2 is the journey a "customer" takes in relation to a US hospital. Both these maps were developed by one of the authors of this article.

Figure 1

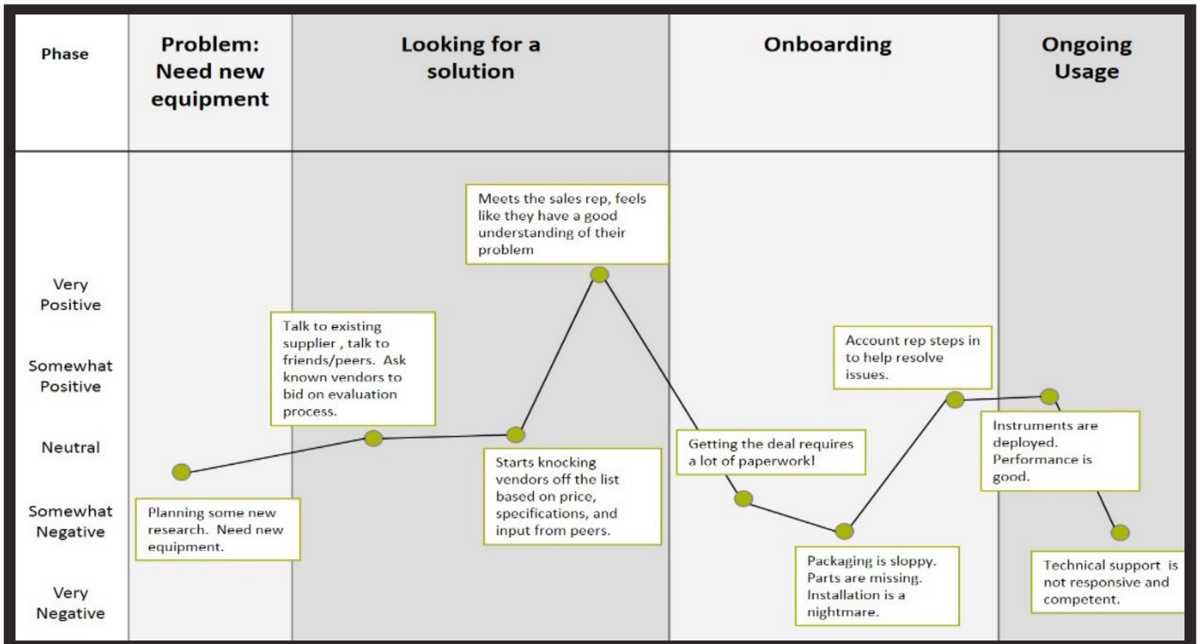
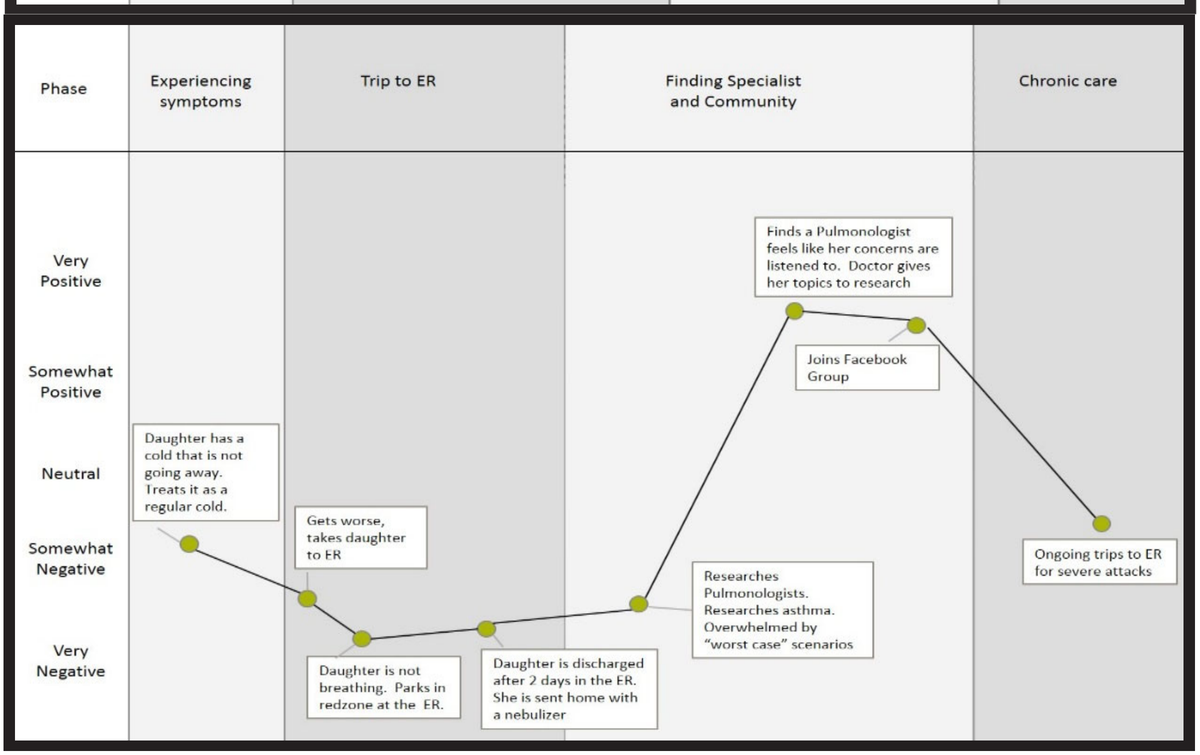


Figure 2



These journey maps are a powerful tool to understand your customers because they highlight how customers transition through all of the different stages. They can be used to identify where the experience could be improved. Note that not all customers take the exact same journey, so understanding variations in the journey will be important. The map can also be used to help, in a sense, "re-route" the customer's journey. For example, if one of the external parts of the journey (perhaps a social media site) is negative towards your company, then you can work towards convincing customers to go to alternative social media sites or to talk to other experts. If this cannot be done, then steps should be taken to improve your company's reputation on these sites.

Intelligence practitioners should recognize that the customer journey map and process involve many parts of the organization, so integrating them into ongoing intelligence operations is critical and helps to extend the reach of your intelligence operation.

Customer journey maps really are about intelligence, and, given their growing popularity, provide enormous opportunity for intelligence practitioners to enhance their role and responsibility within their organizations. In their Harvard Business Review article, Rawson, Duncan and Jones (2013) mention the challenge of developing customer maps, and without realizing it, put customer maps clearly in the domain of intelligence practitioners when they wrote that it's about "acquiring new types of information and combining it in new ways. For many companies, combining operational, marketing, and customer and competitive research data to understand journeys is a first-time undertaking, and it can be a long process".

Who other than the intelligence professional understands how to acquire new types of information from throughout the company? Who in the company is more focused on understanding the external environment than the intelligence practitioner? That's their full-time job. Learn more about customer maps (references are provided below), and start thinking about how to use them to make your organization more competitive. A few suggestions for intelligence practitioners:

- Assess the customer journey map and make recommendations to improve it

- If there is a bump in the journey from externals (bad mouthing from existing customers, past customers, industry participants), look for ways to either improve what they say or neutralize its impact.

- Use the customer journey map to refine your customer profiles and remember that not every customer will follow the exact same journey.

- Use the customer journey company touchpoints (that is, the places where the customer interacts with your company) as an opportunity to collect information to refine the customer journey map, but also use these to collect other information needed for your intelligence program. Customers can tell you a lot about competitors at each of these touchpoints.

- Identify who in the company is part of the customer journey and who your customers and potential customers interact with at each stage of the journey (from this article, you now know it's a lot more than just sales and marketing), and ensure that they have the proper training to collect the information needed for developing the customer journey map and know what to look for.

- Identify the indicators, the signs, the information to collect for each of the stages – in others, develop organization-wide intelligence plans for the development of the customer journey map.

- Ensure that your organization has the right analytical models and, if needed, software for assessing where customers are feeling stressed, anxious, annoyed, or satisfied.

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Aligning Intelligence with Your Organization's Innovation Strategy

Competitive Intelligence Magazine, September–November 2016

The hottest topic I am dealing with these days is innovation. Since April, I have attended five events on the topic – one event was organized as part of the Three Amigos Summit (the gathering of the US president, the Mexican president, and the Canadian prime minister), three mini-conferences with panels and keynote speeches, and a conference focusing only on innovation. Not only is it a hot topic at events, but innovation, and in particular open innovation (from partners/sources outside the company), is dominating corporate discussions as well. Many of the world's largest companies, such as General Mills, Procter & Gamble, General Electric, Lego, Samsung, CISCO, Telefonica, Coca-Cola, Microsoft, Shell, Google, Orange, Kraft, Pfizer, and Siemens, are all actively involved in open innovation programs. Procter & Gamble, for example, set a goal of getting 50 percent of their innovations from open innovation (from outside the company).

As for the link between innovation, open innovation, and trade show intelligence – as I have written in many past columns, a trade show is a great place to find Innovation. It's where companies go to display what they think is innovative (such as new products and services), where customers talk about what innovations they want or would value, where experts go to talk about future innovations, where seminars/workshops are held on the topic, and where other innovation activities abound. In this article, I look at how trade shows and events can be used to help an organization's innovation program and help with open innovation. I provide five tips to help your organization use trade shows and events to help with innovation.

I am not the only one who writes and talks about trade shows as a place to go for innovation. Forbes had a feature on it several years ago which was written by Gary Shapiro. In the article, titled "Want Innovation? Go to a Trade Show", Gary wrote: "The power and purpose of trade shows in our rapidly connected world continue to grow with each year. Far from being a relic of a bygone age, today's trade show remains the premier event to learn, interact and maybe even strike a deal with America's next generation of innovators. So get on a plane. Go to a trade show. Think outside the box. Be open to new ideas. And have a bit of fun along the way."

General Mills also recognized the link between innovation and trade shows. When they created their worldwide innovation network, they tasked employees (among other activities) with attending inventor trade fairs and trade shows around the world in the hopes that they would bring back new and innovative ideas. Even trade shows themselves have recognized their role in helping to promote open innovation. The INPEX trade show put out a press release titled "Trade show expands corporate access to open innovation – thousands of inventions at INPEX invention show" and in the release, they stated, "Companies interested in open innovation can gain access to thousands of new product ideas available for manufacturing, marketing, distribution, or licensing at InventHelp's INPEX® Show." Trade shows themselves, corporations and the media are turning to trade shows as sources of open innovation, and trade show teams should consider doing the same.

INNOVATION AND INTELLIGENCE – THE TRADE SHOW LINK

In their best-selling book, Innovation, Curtis Carlson and William Wilmot (2006) defined innovation as "the process of creating and delivering new customer value in the marketplace". To me, this means that innovation can exist only if the external environment or customers label it as such. Intelligence can be used to understand what kind of innovation is desired by customers in the marketplace. It can be used to determine if the innovations that the organization is working on will be seen as innovative by customers. Intelligence can also be used to identify what innovations competitors are working on.

Intelligence is the only part of the organization that is tasked with understanding and predicting what is happening in the external environment, which means that it is best positioned to help the organization with its innovation strategy. An integrative intelligence function should be tasked with assessing the extent to which any idea deemed innovative is truly innovative. I would suggest that trade shows are excellent places to go to for an intelligence team/individual to determine whether or not an idea is truly innovative. Trade shows bring together customers who determine if a product/service is innovative, competitors who can tell you what innovations they are working on, and industry experts who have a breadth of knowledge about the industry that can also help to assess how innovative an idea is. It's the one place where everyone from the external environment who matters for innovation purposes, is there and they want to talk about innovation.

Trade Show Innovation Intelligence Tip #1

Take all your organization's innovation ideas to trade shows/events to determine which ones are truly innovative.

OPEN INNOVATION AND INTELLIGENCE – THE TRADE SHOW LINK

In 2003, Henry Chesbrough started the Open Innovation Movement with the often-quoted line that "not all the smart people work for you." The full version of this quote is: "Open innovation is fundamentally about operating in a world of abundant knowledge, where not all the smart people work for you, so you'd better go find them, connect to them, and build upon what they can do." Up to this point, innovation was seen as an exclusively internal organizational function with R&D and others inside the organization coming up with the ideas and then the organization determining, again internally, which ones to pursue towards development, and also which ones to commercialize.

Open innovation implies opening up the entire innovation process to "smart people" outside the organization. Coca Cola's chief procurement officer, Ron Lewis, summed up open innovation and its importance when he said, "Our goal is to be the best at innovation in the industry and the way we're going to do that is via an open network. And there is a good chance that the source of such innovation may well come from outside Coke's R&D department. We want to be the best at connecting the dots" (Watson 2012). Finding ideas outside the organization and connecting the dots are certainly the objectives of open innovation and definitely areas where competitive intelligence has a role to play.

As for trade shows and open innovation, given that a trade show is the one place and time where all the smart people in an industry come together, it makes sense that these would be prime locations for open innovation programs. It's no wonder then that under the open innovation strategy of General Mills, employees were asked to go to trade shows and find both people and ideas that could help General Mills become more innovative.

Trade Show Innovation Intelligence Tip #2

Use trade shows to identify both the "smart people", who you will want to work with your organization for innovation, and also the "smart ideas".

WHAT KIND OF INNOVATION INTELLIGENCE IS NEEDED?

Part 1: Type of Innovation

Many of you reading this article will associate the concept of innovation with the idea of developing new products or services. Just to be sure, this IS a very important focus of innovation, and consequently trade shows are great places to find new product or service ideas. They are places where you can talk to customers about what they think is innovative and where you can see what your competitors are showing as innovative products and services. You can even ask those at the event what innovative products and services they expect or want to see in the future.

But over the years, the experts have broadened the idea of innovation to extend to more than just new products and services; they have identified several different dimensions of innovation. The Organisation for Economic Cooperation and Development (OECD) wrote: "Innovation goes far beyond R&D; they noted four kinds of innovation: Product innovation, a good or service that is new or significantly improved; Process innovation, a new or significantly improved production or delivery method; Marketing innovation, a new marketing method involving significant changes in product design or packaging, product placement, product promotion or pricing; Organizational innovation, a new organizational method in business practices, workplace organization or external relations" (https://www.oecd.org/site/innovationstrategy/defininginnovation.htm).

This was further broadened by Keeley et al. (2013) in the book, *Ten Types of Innovation: The Discipline of Building Breakthroughs*, where they identified 10 categories of innovation that were further subdivided into three broad categories:

- **Configure innovation.** Profit model: how you make money; Network: how you connect to others to create value; Structure: how you organize and align your people and resources to create value; Process: how you use superior methods to do your work.
- **Offer innovation.** Product performance: distinguishing products, services, functions, and features (call this the old view of innovation); Product system: creating complementary products or services.
- **Experience innovation.** Service: supporting the value of your products/services; Channel: how you deliver the products/services to customers and users (including geographically where you deliver them; Brand: how you represent your products/services/business;

Customer engagement: how you develop better interactions with customers (see, for example, my column on "Customer Journeys" for more on this).

The Keeley et al. book is a good read for intelligence professionals as it will give them a handle on the breadth of innovation. Figure 1 provides a useful graphic summary of their model.

Trade shows can be used to find ideas for innovation in each of these areas. Properly organized, event intelligence teams can use trade shows as opportunities to talk to customers, competitors, and industry experts to identify ideas in each of these areas. But first the intelligence team will need to identify for which areas of innovation their organization wants to develop ideas.

Trade Show Innovation Intelligence Tip #3

There are many different kinds of innovation. Identify the categories or types that are most important to your organization and develop intelligence topics around each to execute at the trade show. Remember, it's not just about R&D and new products/services.

Figure 1: Ten types of innovation

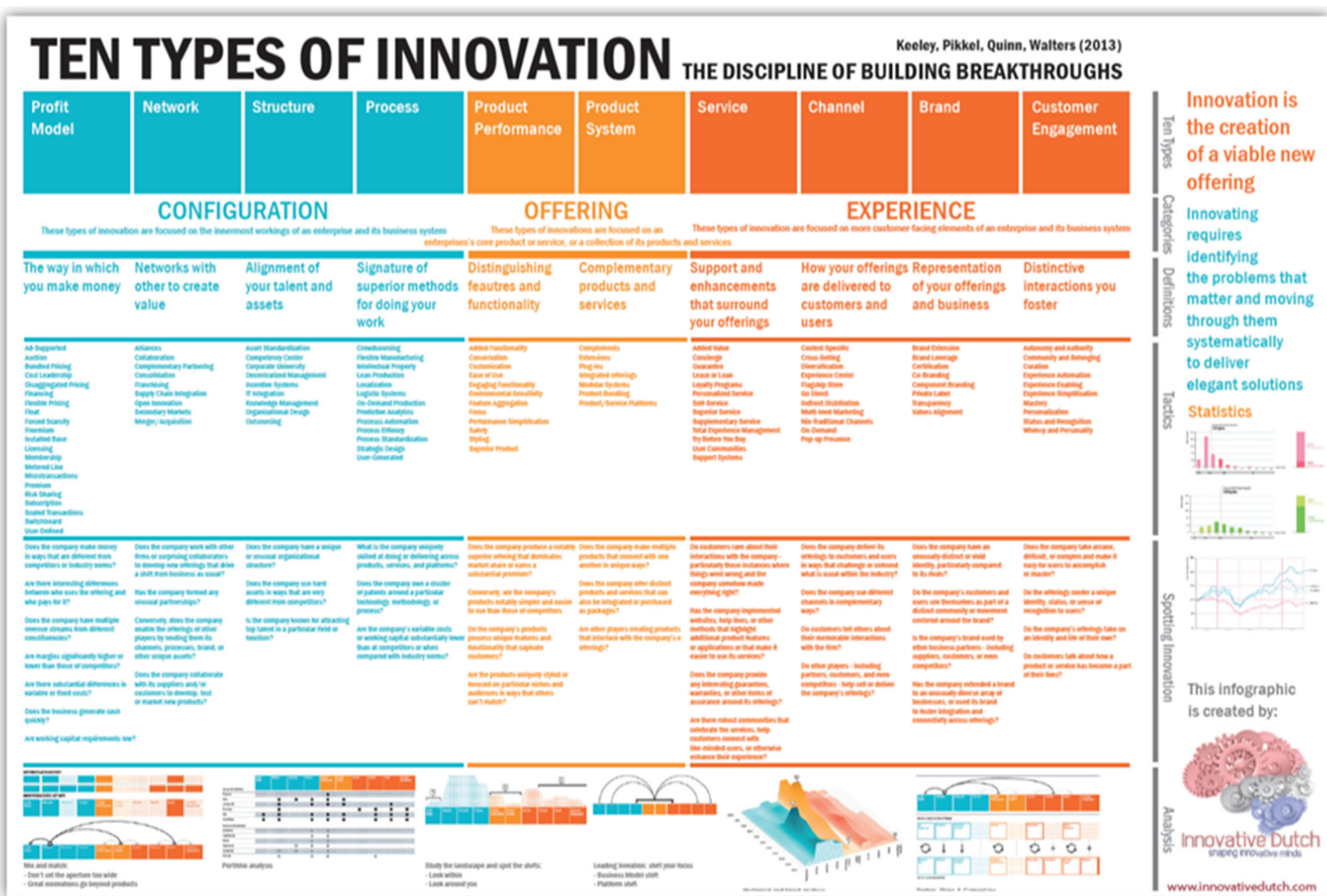

Figure 1: Ten types of Innovation
Source: http://www.openinnovation.eu/26-06-2014/ten-types-of-innovation-infographic/

WHAT KIND OF INNOVATION INTELLIGENCE IS NEEDED?

Part 2: The Innovation Value Chain

The Innovation Value Chain - IVC (see Figure 2) describes the different steps that need to be taken in order to develop and transform innovative ideas into practiced ones. While most people associate the concept of innovation with the idea being generated, the IVC notes that there are several additional steps that need to be taken.

Idea generation is very important, but with all the innovative ideas that are generated, organizations also need to decide which ideas identified in the idea generation phase of the IVC should be selected for further consideration. The selection process involves screening and in some cases initial funding. After selection, development activities can occur for those ideas deemed worthy. Together these two activities – selection and development – are referred to as the conversion stage of the IVC. The final stage in the IVC is diffusion. This refers to the processes involved in identifying those innovative ideas that are going to move from development to production, and ultimately moving those ideas throughout the organization or to the market (commercialization activities).

Figure 2 shows the IVC from the perspective of open innovation and the old, closed internal model. With an open innovation approach, organizations can look for ideas and help at each stage of the IVC both from inside their own organization and from people outside the organization. For example, P&G instituted a policy that "any idea that originates in its labs will be offered to outside firms, even direct competitors, if an internal business does not use the idea within three years" (Chesbrough 2003).

Thus, P&G, who, as mentioned earlier, is looking for 50% of innovation ideas to come from outside their organization (idea generation) is also open to outside sources for conversion and diffusion:

Figure 2: The Innovation Value Chain

	IDEA GENERATION			CONVERSION		DIFFUSION
	IN-HOUSE Creation within a unit	CROSS-POLINATION Collaboration across units	EXTERNAL Collaboration with parties outside the firm	SELECTION Screening and initial funding	DEVELOPMENT Movement from ideas to first results	SPREAD Dissemination across the organization
KEY QUESTIONS	Do people in our unit create good ideas on their own?	Do we create good ideas by working across the	Do we source enough good ideas from outside the firm?	Are we good at screening and funding new ideas?	Are we good at turning ideas into viable products, businesses and best practices?	Are we good at diffusing developed ideas across the company?
KEY PERFORMANCE INDICATORS	Number of high-quality ideas generated within a unit	Number of high-quality ideas generated across units	Number of high-quality ideas generated from outside the firm	Percentage of all ideas generated that end up being selected and funded	Percentage of funded ideas that lead to revenues; number of months to first sale	Percentage of preparation in desired markets, channels, customer groups; number of moths to full diffusion

Source: Hansen and Birkensaw (2007), *Harvard Business Review.*

There are many examples now of companies turning to outside people and organizations for each element of the IVC. Even screening and initial funding have successfully been put in the hands of people outside the organization. Since Chesbrough's 2003 seminal book, Open Innovation, we have learned that every aspect of the IVC can be successfully executed in an open way. However, given the external orientation of this process, intelligence is critical to making this work and it's no wonder that many organizations with open innovation strategies have the necessary foresight or intelligence capabilities.

The intelligence implications of the IVC are two-fold. First, in looking at intelligence in general and the IVC, the idea is to develop the intelligence required to help your organization make the right decisions at each stage of the IVC. For open innovation, intelligence is also needed to help identify the right partners, or external organizations, for your organization to work with at each stage of the IVC (or those parts of the IVC for which open innovation is to be used). For the trade show, consider how an intelligence team, through appropriate interviewing and elicitation techniques, could effectively work with customers and others at the event to help in idea generation, conversion and diffusion. Then also think about how the intelligence team could also use the trade show to identify potential organizations and people to team up with, to work with for idea generation, conversion and diffusion.

In the P&G example mentioned earlier, an intelligence team from a P&G division that had been sitting on an innovative product idea for three years would be looking to identify appropriate diffusion/development partners. Trade shows abound with organizations that have successfully brought products and services to market which could be approached for these purposes.

Trade Show Innovation Intelligence Tip #4

Use the IVC to identify the stage at which each of the organization's innovation ideas is. For each innovation idea, identify the intelligence needs that are required to make the decision as to whether or not the innovation idea should move into the next stage of the value chain. Then look at how the trade show can provide the information needed to help make that decision.

Trade Show Innovation Intelligence Tip #5

For each innovation idea for which the organization intends to develop through open innovation, use the trade show to identify/find the right partners/people.

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Business Analytics and Big Data Meet Trade Shows

with Greg Richards

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In this issue's event intelligence column, I team up with Greg Richards to look at the potential for business analytics at trade shows. Greg and I co-chair the Business Analytics and Performance Management group at the Telfer School of Management, University of Ottawa. We have been exploring the role of business analytics in a wide variety of areas, and lately I have been thinking a lot about the interface between big data, business analytics, and trade shows, for a variety of reasons.

1. Trade shows have become big data

I have seen an explosion in the kind of information that is available at trade shows and events. When I started in trade shows in the 1970s, it really was about gathering secondary information (brochures and the like, picked up at booths), business cards and notes made during interviews. Over the years, I became aware of the benefits of pictures and videos on the show floor (where allowed or where provided), recordings of workshops, keynote addresses, copies of posters from poster sessions, and the like.

Five years ago, I was introduced to yet another information source from events: recordings made at the booth, transcribed and analyzed overnight with the analysis provided in the morning for action that day. Since then, other information sources have been added, including Twitter and other social media, and information from barcode scanning, RFID session attendance tracking, and others. So, there is much information now. Some of the information is structured and some is not, but the volume of this information has grown dramatically over the years and with it, the opportunity to learn more about customer needs, competitors' plans, technology trends, and the like.

2. Big data and analytics are now in the trade show mainstream

More and more has been written in trade show articles (not event intelligence, but the trade show itself) about big data and analytics. In a study on chief marketing officers conducted in late 2013 by the Exhibit and Event Marketers Association and Chief Marketing Officers Association, it was reported that 73 percent wanted improved attendee analytics and insights as part of exhibitors' reporting. In the study it was noted: "What is clear is that marketers are looking for value-added components to their event investments that deliver insights, measurements, analytics, and deeper engagements with their most valued prospects and customers" (CMO 2013). But this is not the first (nor the last) that was written about analytics, big data and trade shows. Roger Lewis, writing about trends at trade shows in 2012, identified two analytics trends:

- **"Data"** and **"analytics"** will be the watchwords of 2012 as platform developers further refine the concept of intelligent events – a holistic approach to analyzing all of the data from surveys, mobile event guides, social media, attendee behavior (RFID), and registration in order to understand the interests and preferences of attendees.

- **Visual reporting and analytics intelligent reports**. Data extracted from multiple sources during the course of the event will become more visual and more available in real time so that planners can make changes to the event as it unfolds. Post-conference planning will become easier in the next 12 months with standardized decision-making tools (Lewis 2012).

As more and more data is made available at trade shows, it's not surprising that more is being written about the need to use this data to help companies maximize their trade show return on investment.

3. Growth in big data analytics software/tools and capability

It's not just the data that is growing; so, too, is the development of tools to deal with both structured and unstructured data. It's recognized that what most of the big data people talk about is actually unstructured forms, such as tweets, images, and sound. Let's talk about three basic sets of tools: data processing, data transformation, and data analysis. One of the things we know is that unstructured data needs heavy-duty processing power to capture, store, and conduct analyses. Advances in file-clustering approaches (such as Hadoop) permit organizations to process data up to 10 times faster than if they used traditional data management tools. Data transformation has also been addressed through changes in database structures. Without going into too much of the details here, we can conclude that data processing and storage of unstructured data are technically not a barrier to the analysis of trade show information.

4. Analysis tools strengthened

For analysis, many tools that have been around for years have been beefed up to handle both structured (think quantitative data, such as number of attendees at different booths, for example) and unstructured data (think individual comments). Standard statistical tools, such as IBM SPSS Modeller and SAS analytics, now permit some analysis of text and numbers. In addition, specialized tools that focus solely on text are now available. It is important to understand, however, that just "seeing things" (that is, describing what people are saying or how many visit a booth) is interesting but not enough to deliver benefits to organizations. The real power of analytics is that managers can better identify, for example, which attendees are more likely to purchase, thus helping the company to save time and money while achieving better results. In addition, comments from trade show attendees, if properly analyzed, could lead to product/service improvements or the development of new products altogether. Ultimately, the marriage between analytics and trade show data should allow companies to: grow revenue, control costs, or generate new product or service ideas.

EXAMPLES OF ANALYTICS AND BIG DATA AT WORK AT AN EVENT

Sentiment analysis and word maps help you understand what is happening at the booth

Throughout a trade show, thousands of conversations take place at the booth between company staff and customers (as well as others). But how do you make sense of these conversations? How do you effectively mine them for customer insights? A typical approach has been to ask booth staffers at the end of the day (or the show) what they heard or conduct periodic interviews with booth staffers. Today, with analytics, it is possible to systematically gather all the information and analyze it to develop customer insights. Below is an example taken from recent customer interviews.

With the permission of the customer, the interview was recorded. Customer conversations, for example, include product desires, discussions about the company itself, experience, and so forth. As a first step, all the information collected was run through a free, online sentiment analyzer (see results in Figure 1). A sentiment score of 26.8 emanated from the discussion, indicating slightly positive feelings towards the company and its products.

A deeper analysis using the Wordmap revealed strong feelings (the larger the word, the more it was mentioned) about the company technology and the people at the company whom the customer gets to work with (note the large words, "technology" and "people"). But even larger and more frequently mentioned was the word "customer". An examination of the words and concepts around the word "customer" revealed a growing concern on the part of the customer that they were being taken for granted.

The insights gained from the sentiment analysis and the Wordmap were clear: customers were impressed with the technology that the company was offering and the quality of the people they were dealing with, but were growing increasingly concerned by the company's attitude towards them. This might have been contributing to deteriorating customer sentiment. By analyzing all interviews in this manner, much valuable insight can be gained.

TRACKING SOCIAL MEDIA – AN EXAMPLE FROM THE CONSUMER ELECTRONICS SHOW

Mining information from conversations is one example of analytics and trade show applications. Another is using social media analytics during an event. Facebook, Twitter, and other social media output have become an important part of event strategies. Whether it is event organizers themselves, participants, media, or others at an event, the amount of social media output is growing and the ability to develop market, customer, competitor, and other insights is also increasing. Kevin Shively wrote extensively about this in his blogs about the 2013 Consumer Electronics Show including mentions of key trends during the event (Figure 3) and Twitter brand mentions during the event (Figure 4). The blogs have more graphics and analysis, and readers are urged to read both Kevin's article about the CES and Tdalmin's blog posting about what marketers can learn from CES.

A few observations from us, the authors:

1. The analysis of key trends per day enables the intelligence team to refocus on what is key at the event. Furthermore, if part of our strategy is to get "talk" on trends that are relevant to our company, then this provides a real-time analysis of the impact of this type of program and the possibility of taking corrective action (for example, if what we want talked about is not being mentioned in key trend tweets).

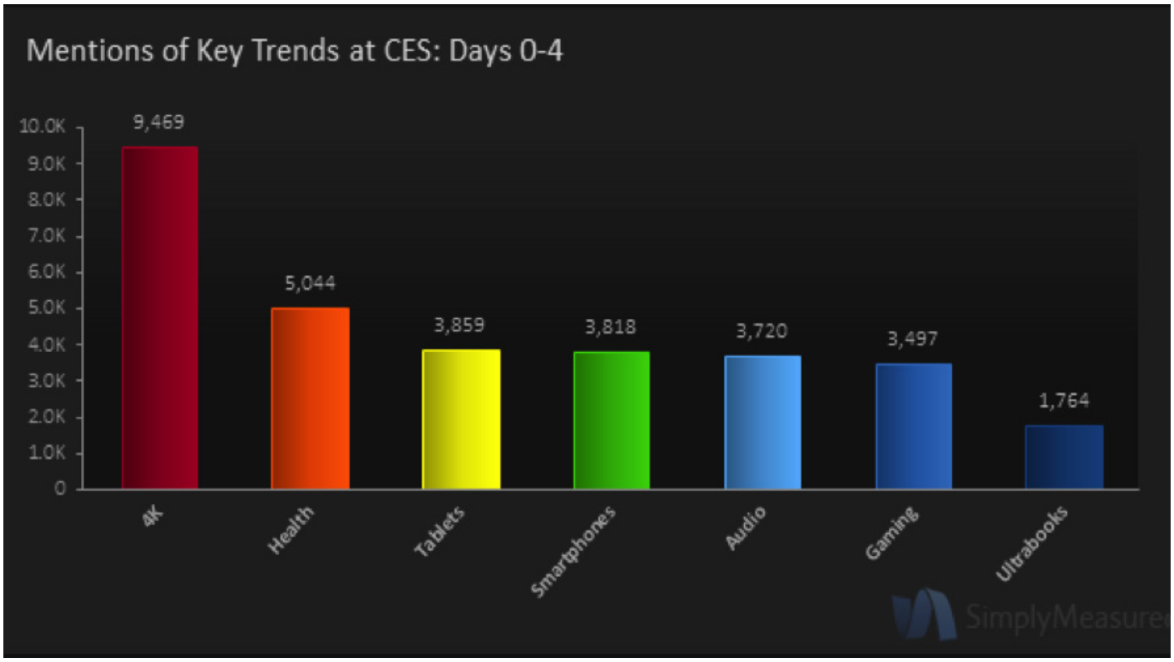
2. Analysis can go deeper than simply the number of tweets (Are our topics mentioned? Are we being mentioned?) to include an analysis of both the source of the social media discussion and the extent to which it is being followed (influence metrics). In fact, Tdadmin (2013) writes about using influencers to "create a buzz".

3. Social media can also be used to post an event analysis, as the discussion on the event occurs well after the event.

Figure 1: Sentiment analysis of customer interview from http://www.danielsoper.com/sentiment analysis/default.aspx#

Figure 2: Wordmap from Worldle, taken from customer interviews

Figure 3: Mentions of key trends at Consumer Electronics Show (CES) (Shively 2013)



ADVICE FOR MANAGERS

This article has shown how business analytics, big data, and trade show intelligence are natural partners. In the future, the authors of this article will be developing more materials to help SCIP members and others take advantage of the opportunities created from this nexus. As a starting point for readers, we offer a few steps to help you develop an event intelligence big-data analytics plan.

1. Define the business value of the data you will be collecting (that is, grow revenue, stimulate innovation, etc.) Consider whether the goal is acquisition or customer retention, or some combination of the two, but seek to quantify it as much as possible. Good customers can really help with product design and development; multiple benefits can accrue from a sound acquisition and retention strategy.

2. Define the type of data available (quantitative, qualitative, mixture of both). The point here is that if you want to gather text, images, sound, etc., this implies a certain type of analysis which in turn calls for specific tools and skill sets.

3. Identify the types of analyses that can help deliver the business value expected. For example, sentiment analysis can help identify general trends, but is this enough to support investment in new product development?

4. Execute the appropriate data collection and analysis. Execution is often a challenge: trade shows are typically busy areas with lots of information moving rapidly. A systematic approach will help ensure the right data is captured and properly handled.

5. Evaluate, adjust, and repeat. Evaluation of results is important because it cycles back to the first point: what were the expected business results? Based on this assessment, data capture and analytics tactics can be adjusted and improved.

Figure 4: Consumer Electronics Show (CES) Twitter brand mentions (Shively 2013)

CES Twitter Brand Mentions

SimplyMeasured

Tech Brands	Total Share of CES Tweets	Day 4 Share of CES Tweets	Day 3 Share of CES Tweets	Day 2 Share of CES Tweets	Day 1 Share of CES Tweets	Day 0 Share of CES Tweets
Samsung	7%	5%	6%	7%	5%	11%
HP	4%	10%	6%	5%	1%	1%
Sony	4%	2%	2%	2%	5%	7%
Intel	3%	2%	2%	2%	3%	4%
Audi	2%	2%	3%	3%	2%	2%
Panasonic	2%	1%	1%	2%	3%	2%
Qualcomm	2%	1%	1%	1%	2%	4%
LG	2%	1%	1%	1%	1%	3%
Lenovo	1%	1%	1%	1%	1%	2%
NVIDIA	1%	1%	0%	1%	1%	4%
Google	1%	1%	1%	1%	1%	2%
Sharp	1%	1%	1%	1%	1%	2%
ARM	1%	1%	1%	1%	1%	1%
Apple	1%	1%	1%	1%	1%	1%
Huawei	1%	0%	0%	1%	1%	1%
Ford	1%	0%	0%	0%	1%	1%
Verizon	1%	0%	1%	1%	1%	1%
Razer	1%	1%	1%	1%	1%	0%
Cisco	0%	0%	0%	0%	0%	1%
ASUS	0%	0%	0%	0%	1%	1%
Polaroid	0%	0%	0%	0%	1%	0%
Dell	0%	0%	0%	0%	0%	0%
Vizio	0%	0%	0%	0%	0%	1%
Sprint	0%	0%	0%	1%	0%	0%
Alcatel	0%	0%	0%	0%	0%	1%

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Event Intelligence Goes Social Networking

Competitive Intelligence Magazine July–September 2010

My last column extended the concept of event intelligence by applying it to parties and sporting events. These places shared several characteristics with conferences:

- ***Many people are there.*** Customers, competitors, regulators – all these people possess the information you need for developing intelligence. It's your external environment all in one place.
- ***People want to talk*.** People attend events with the objective of exchanging information. The word is trade "show", not trade "protect". Enough said.
- ***They are relaxed*.** Hey, it's a fun environment; people are generally glad to be there and away from the office.

Now, I have another place that meets these criteria, and where you need to have an event intelligence plan and program in place: social networks. So, this column looks at online social networks as a place for running an organized events program.

THE TRADE SHOW AND SOCIAL NETWORKING ANALOGY

The other day, I was looking at Nestle and Kraft Facebook pages, and realized they were very similar to trade show booths. Companies were putting up information they wanted to show to various targeted audiences (especially younger ones for Facebook). These audiences even had the ability to observe and listen to "dialog at the booth" (postings) and "hear" how the company responded to them.

I then went over to Twitter. When looking for various topics that I would typically see as themes for workshops at conferences, I realized that reading the "tweets" was similar to listening and asking questions during an event. Everyone is chatting about targeted topics and I can join in.

Concerning LinkedIn, Ellen Naylor wrote:

> ***"When conducting research or competitive intelligence (CI), it is advantageous to have a large, broad network to connect with more people. So I will focus on LinkedIn, one of the largest B to B social networks ..."*** **(Mailer #4, Connect Through Social Networking)**

So, here's another reason why people go to events: to connect to or expand their network when, similar to LinkedIn, they are all in one place.

As I looked deeper into social networking, I also realized that in these networks, similar to what happens at trade shows, people like to talk and are very open with their comments. Soumitra Dutta, co-author of *Throwing Sheep in the Boardroom*, indicated that the rise of social networking is partially attributed to a shift in demographics which favors openness, and to an innate desire to identify with communities. Steve Duncan noted:

> ***“Engaging the community is one of the best reasons to join a social networking service. By connecting with and interacting with more folks in your industry, you are exposed to all kinds of opportunities”*** **(“Social Networking Systems”, *Competitive Intelligence Magazine*, July/August 2006, pp. 16–20)**

People go to conferences to identify and be part of a community, and to expose themselves to opportunities. Similar to trade shows, the social and open nature of online networking encourages everyone there to exchange information. Given all these commonalities with conferences and trade shows, social network sites clearly fall into the category of events and should be subject to the same guidelines and ideas that govern event intelligence. This especially includes competitive intelligence’s ethical guidelines, as it is far too easy to change your identity and misrepresent yourself on social network sites.

THE UNIVERSAL SOCIAL NETWORKS

As part of event intelligence, social networking represents a huge and growing opportunity for networking and collection. Virtually everyone I know is part of one or more of the popular social network sites – according to Facebook, the site had 500 million users as of May 2010. So, similar to going to an event, everyone is definitely there.

Not only is the social networking membership growing, but more people are using it for competitive intelligence. The Global Intelligence Alliance wrote that “social media applications will be used increasingly for collecting and sharing information for market intelligence” (MI Trends 2015 – the Future of Market Intelligence). All this says to me that similar to trade shows, the opportunity for networking and collection is huge.

INFORMATION VALIDATION

Given their similarities, you can apply the same justification for using social networks as for attending event intelligence programs. In many of my articles, I have emphasized that one of the advantages in creating event intelligence programs is the ability to easily validate information at these events. The concern raised by many about social networks is that it is easy for anyone to put up misinformation and that information is hard to validate. However, while the former is true, the latter is not – validation can be done.

First, other people’s reactions and comments concerning posted information certainly provide insight into the information’s validity. Second, using many of the features available on social network sites, you can do some validation and obtain background on the person who posted the item. For example, you can look at what kinds of information the person has placed on social networking sites in the past. Some software being developed allows you to identify the influential people on the social networking site, and the core network and strength of the network. I follow the same process at a trade show by watching who is talking to whom.

SOCIAL NETWORK TOPIC FOCUS

Similar to trade shows, social network sites each have their own subject focus, so choose a site based on your individual intelligence needs. For example, when you compare the demographic information on Facebook and LinkedIn, it shows that you can gather information from younger and perhaps less professional people on Facebook, while LinkedIn is more oriented to older professionals. Quantcast.com lists the following statistics for US users:

- Facebook for 2010: 13–17 (22 percent); 18–34 (42 percent); 50+ (12 percent). Income over $100K (32 percent) and grad school (13 percent).
- LinkedIn for 2010: 50+ (32 percent); 35–49 (38 percent). Income over $100k (39 percent) and grad school (27 percent).

There are, of course, specialized social networking sites just as there are specialized trade shows. For example, Shapingtomorrow is a social networking site for futurists. The site gives its members the ability to converse and share information with each other on futures-oriented subjects through forums, groups and direct messaging. In one instance they were invited to submit their views on how to tackle the financial crisis by the United Nations and the G20. This site represents a growing area of social networking – the specialist site.

The people who are using this social network site include those working for AstraZeneca, Nokia, BP, Bosch, the Australian government, the Singapore government, and more. These groups use the social networking information for horizon scanning, strategic thinking, action planning, networking, project management, education, tools, surveys, offline, trend alert briefings, virtual assistance, scouting networks, and more. While the ability to exchange information on this site is reserved for those individuals who have passed rigorous screening criteria, anyone can access the site and view the information and discussions after purchasing a subscription.

A FEW DIFFERENCES

Events and social networking sites do have a few differences. For one, unlike events, the ability to access social network information is not limited to a specific time. You can revisit the networking site and obtain information when you need it. Another major difference (and one clearly in favor of social networking) is that the sites often provide free software to help analyze the vast amounts of information on the social networking sites.

For example, Babette Bensoussan, in her November Newsletter, talked about Boardreader, a specialized search engine that covers social networking sites such as Facebook discussions, Twitter messages, microblog content, discussion forums and video files, in addition to the posts within individual discussion groups and forums. Boardreader provides data-mining-based trend charts, where you can see when a topic is gaining more attention or losing it.

Trendrr is another software tool that can trace social trends from several social networks, microblogs, etc. It tracks what has been said on these sites about targeted topics and trends these over time. It also allows you to compare these trends by monitoring and evaluating tracked information. It’s like listening to all the conversations happening simultaneously at an event and analyzing them in real time.

Additional tools are useful for tracking information on specific sites. For example, Twitter has TweepSearch which allows you to see who are followers and who are friends of the poster.

SO HERE IS MY MESSAGE

Since social networking sites have many of the same characteristics as events, they are excellent places for gathering information and developing intelligence. Based on these similarities, you should integrate social networking into your event intelligence program and subject the site's information to the same rigorous criteria.

Look at social networks as places to gather and validate information. People go to these sites when they want to share information. More and more social networking sites provide software to make sense of what is going on in those millions of conversations taking place in each one. The opportunity is huge and you had better be organized, just like at other events. Time to develop an event intelligence plan for social networking!

Social Networking and Events: Life Goes Digital

Competitive Intelligence Magazine, January–March 2011

SCIP has been focusing more and more attention on social networking and intelligence. The Global Intelligence Alliance noted that the use of social media for intelligence would be one of the fastest growing trends for 2015 (Global Intelligence Alliance, 2015). So, imagine my interest when I saw a recent academic paper titled "How people are using Twitter during conferences" (Reinhardt et al. 2010). Based on a survey of participants at five conferences, the paper looks at how they used micro-blogging at conferences.

A little while later, I read a blog report on how Messe Düsseldorf (one of the larger trade show facilities in Germany) is providing various social networking applications to their clients as a way of differentiating themselves (Klemm 2011). Just search using Twitter at trade shows or social networking at conferences, and you will find millions of hits. It is a popular topic. So, what are the experts recommending with regard to social networking and events?

Let me start off with a short intelligence story: go to get advice from the experts, and then spend a bit of time discussing the intelligence implications of it all.

TECHNOLOGY CONFERENCE TWITTERING EXAMPLE

Not that long ago, a conference in a technology area was under way. One of the attendees (whom one of my clients was tracking as they were a potential key customer) was twittering from the event. For each session this person attended, he put out real-time Twitter comments on what he found exciting and how it would impact his company.

This person also asked those who were following him on Twitter to offer their insights on what he was tweeting, including any questions they wanted him to ask the experts on their behalf. Furthermore, to enhance personal networking at the event, the individual described himself, what he was wearing, and where he was sitting, and then invited anyone who wanted to dialog with him live to join him in the room. He provided updates on his location throughout the show. Wow!!!! I hope I don't have to explain the intelligence implications of all of this to readers of the column. The intelligence opportunities provided by these actions are enormous.

CONFERENCE TWEETING

My fascination with the Reinhard article stems from it being a survey on how participants used Twitter at events. This was not a best practice or advice guide from experts, but a very useful collection of insights into how people's use of Twitter at events can be valuable to those of us in intelligence.

Keep in mind that Twitter is a public forum where all can see the "tweets". I was fascinated by the type of public information that participants were creating in real time on the internet during a show. In general, participants reported using Twitter during a show:

- To reach out to others with similar interests;
- To invite a valuable networking experience;
- As a way of discussing presented topics and exchanging additional information.

Imagine the profiling opportunities for intelligence professionals that arise from this information voluntarily being provided online. Additional and potential interview topics are also provided through this exchange of information. In terms of what I see as the top uses of Twitter during events, participants reported that they used it for:

- Sharing resources (getting help from others);
- Communicating with others
- Participating in parallel discussions (even during multiple sessions);
- Posing organizational questions (gathering question ideas for the session speaker from the organization).

While definitely providing profiling opportunities, these latter uses also suggest that intelligence teams can use social networking as a way of engaging their own employees and networks while at an event by providing an opportunity for the intelligence professional to serve as a conduit for asking important questions.

EVENT SOCIAL NETWORKING

The above items represent a snapshot of how some people are using social networking, particularly Twitter, at events. A few other people have written about the potential uses of social networking at events. In 2008, a blogger group who called themselves Meeting Podcast Guys, blogged a list of six ways to use Twitter at a forthcoming event:

- Schedule meetings with like-minded people before the event.
- Alert attendees about changes or after-dinner parties.
- Keep track of what is going on at the event. If you are in a horrible breakout session, you may scan the tweets and see if a better one is going on (conference producers should also be watching this).
- Use it in your presentation to engage the audience (see above).
- Build a brand of how cool your conference is for others watching it through Twitter. The blog world can improve attendance next year from the positive tweets going out.
- Provide real-time performance review and feedback.

Updating this list recently (2011), Brett Duncan noted other things that are of enormous benefit to intelligence practitioners:

- Network before the event.
- Look for registration lists.
- Go offline: meet the people you were tweeting with at the event.
- Foster the hashtag conversation – chime in what others are saying in their tweet.
- Add a post-show personal touch by thanking the folks you met at the show.

- Stay in touch with people after the show.

Clearly, the growth of social networking has reached into the trade show and conference world, along with the opportunity for intelligence practitioners to benefit from and participate in social networking opportunities around events – provided, of course, it is done in an ethical manner, devoid of misrepresentations, and clearly identifies who the people are. In other words, it must be consistent with SCIP's ethical code of conduct.

Box 1: Messe Düsseldorf web and social networking applications

A value-added tool for clients to connect, learn, interact, and keep informed of everything that is going on within the trade show... the Messe App that can be downloaded onto your Apple iPhone, iTouch, or iPad. It features offline search features, Google Maps integration, and interactive floor plans that enable the user to prepare for the trade show visit. With this small app, you can keep all current information about the fair in the palm of your hand, and of course take it with you to the show. Twitter also is being embraced as an interactive means of not just following basic and interesting updates about the events, the industry, and everything else, but allows you to connect with others attending the show in a meaningful way!

Follow Messe Düsseldorf North America's tweets at http://twitter.com/mdnachicago, or Messe Duesseldorf in Germany @MD-GmbH in Germany, or one of our trade shows like #interpack2011, wire Düsseldorf @wiretradefair, Tube Düsseldorf @tubetradefair, MEDICA @medicatradefair, etc.)

In the future, it is not inconceivable that how you visit the show can be tracked in such a way that, if it is observed you are seeking specific products at one of our events, you could also get a "tweet" reminding you that there are other similar products or other interesting companies in certain locations at the trade show that you haven't visited yet.

Source: Klemm (2011)

The rise in the use of social networking and its potential to enhance the trade show and conference experience has not been lost on those who make their living in the trade show and conference industry. For example, employees at Messe Düsseldorf, one of the larger trade show halls in Germany, have established their own blog site (http://blog. mdna.com/). They have also developed a series of web-based and social networking applications designed to make events more productive for the attendees. Ryan Klemm reported on these initiatives on the Messe Düsseldorf blogsite (see Box 1).

I hope that you, as intelligence professionals, recognize the enormous intelligence opportunity arising from the type of tools that Messe Düsseldorf mentions. Having a system that alerts you to collection opportunities based on your interests and where you have been at the show is an enormous intelligence benefit.

Given the growth of and focus on social networking at events, expect more updates in this column on how social networking is being used and the tools out there to help make it more effective at events.

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Technology and Trade Show Intelligence: How Electronic Can You Go?

Competitive Intelligence Magazine, April 2020

RECRUITING TEAM MEMBERS, COLLECTING, AND COMMUNICATING THROUGH SOCIAL MEDIA

Several of my past columns looked at how technology can, and should, be used to assist in event intelligence efforts. In a 2011 column titled "Social Networking and Events: Life Goes Digital", I wrote about how you can use social networking tools to help you both prepare for an event and mine information at the event. The column had examples of how to use Twitter to reach out to people going to an event and communicate with others who were part of your trade show team. If you find out that someone is tweeting highlights and details from the show, the column looked at how to engage those individuals to help you collect data at the show – especially if they are tweeting from a session you could not attend.

The event's Facebook page and a host of other social media sources provide access to information and people who can help you at the event. Social media is a great way to organize your intelligence team, expand your team's numbers, and gather information.

REAL-TIME ANALYSIS AT THE EVENT AND SOFTWARE SOLUTIONS

In 2015, my colleague and friend, Greg Richards, and I wrote a CIM article titled "Business Analytics and Big Data Meets Trade Shows". In that column, we wrote about the use of technology in providing real-time analysis of what is going on at an event. In fact, we wrote: "In a study of chief marketing officers conducted in late 2013 by the Exhibit and Event Marketers Association and Chief Marketing Officers Association, it was reported that 73 percent wanted improved attendee analytics and insights as part of exhibitors' reporting. In the study it was noted that, 'What is clear is that marketers are looking for value-added components to their event investments that deliver insights, measurements, analytics, and deeper engagements with their most valued prospects and customers.'"

We showed how you could develop insights on customer needs/desires, competitor activities, and industry trends using information captured at your booth and running it through word-mapping and sentiment-analysis software. These types of software can sometimes be obtained for free, while packages that have additional features/capabilities are available for a fee. Key trends at the show can also be identified through the analysis of blogger comments, and integrating and analyzing the numerous tweets coming from participants at the show. The column demonstrated a range of software that can help event intelligence teams develop insights from information gathered at the event (see Figures 1, 2, and 3).

Figure 1: Sentiment analysis of customer interviews performed by Jonathon Calof, using Daniel Soper's free online sentiment analyzer

Figure 2: Word map from Wordle, taken from customer interviews

Figure 3: Consumer Electronics Show (CES) Twitter brand mentions (Shively 2013)

CES Twitter Brand Mentions

Tech Brands	Total Share of CES Tweets	Day 4 Share of CES Tweets	Day 3 Share of CES Tweets	Day 2 Share of CES Tweets	Day 1 Share of CES Tweets	Day 0 Share of CES Tweets
Samsung	7%	5%	6%	7%	5%	11%
HP	4%	10%	6%	5%	1%	1%
Sony	4%	2%	2%	2%	5%	7%
Intel	3%	2%	2%	2%	3%	4%
Audi	2%	2%	3%	3%	2%	2%
Panasonic	2%	1%	1%	2%	3%	2%
Qualcomm	2%	1%	1%	1%	2%	4%
LG	2%	1%	1%	1%	1%	3%
Lenovo	1%	1%	1%	1%	1%	2%
NVIDIA	1%	1%	0%	1%	1%	4%
Google	1%	1%	1%	1%	1%	2%
Sharp	1%	1%	1%	1%	1%	2%
ARM	1%	1%	1%	1%	1%	1%
Apple	1%	1%	1%	1%	1%	1%
Huawei	1%	0%	0%	1%	1%	1%
Ford	1%	0%	0%	0%	1%	1%
Verizon	1%	0%	1%	1%	1%	1%
Razer	1%	1%	1%	1%	1%	0%
Cisco	0%	0%	0%	0%	0%	1%
ASUS	0%	0%	0%	0%	1%	1%
Polaroid	0%	0%	0%	0%	1%	0%
Dell	0%	0%	0%	0%	0%	0%
Vizio	0%	0%	0%	0%	0%	1%
Sprint	0%	0%	0%	1%	0%	0%
Alcatel	0%	0%	0%	0%	0%	1%

MANAGING, PLANNING, AND COMMUNICATING TSI ACTIVITIES THROUGH SLACK

So far, the column has pointed out how electronic tools can help in your recruiting, collection, and analysis activities. Now, let's add planning and communications to complete the wheel of intelligence. For this part of the column, I am turning to a discussion I had with Alysse Nockels, one of our more respected CI practitioners, as evidenced by her being made a CI fellow.

To help illustrate some of the comments made by Alysse, I will be referring to a "fictitious" Slack portal that I created. The following is not meant to be an endorsement of Slack. There are many other platforms that CI professionals are using, but because Alysse talked to me about how she is using Slack for her TSI efforts, Slack is the focus of this part of my column.

For those of you not familiar with Slack, I am providing some basic information about it, including information taken from their website (Table 1 – at the end of this article). Basically, Slack is designed to be a collaboration platform which allows those invited to upload materials and communicate with each other. For illustrative purposes, I created a TSI Slack workspace (Figure 4). It took me about five minutes to create the workspace and was very easy. The TSI Slack workspace has multiple channels to upload/read materials, for those who are granted access. The channels reflect the key intelligence that I typically run at trade shows:

- **Competitor profiles insight** (with profile forms for five major competitors);

- **Customer profiles insight** (click on the channel and you get a form for each of the major customers to fill in at the show);

- **Government/regulatory insight**;

- **Innovation insight**;

- **Planning and collection** (for administration elements of the event intelligence plan); and

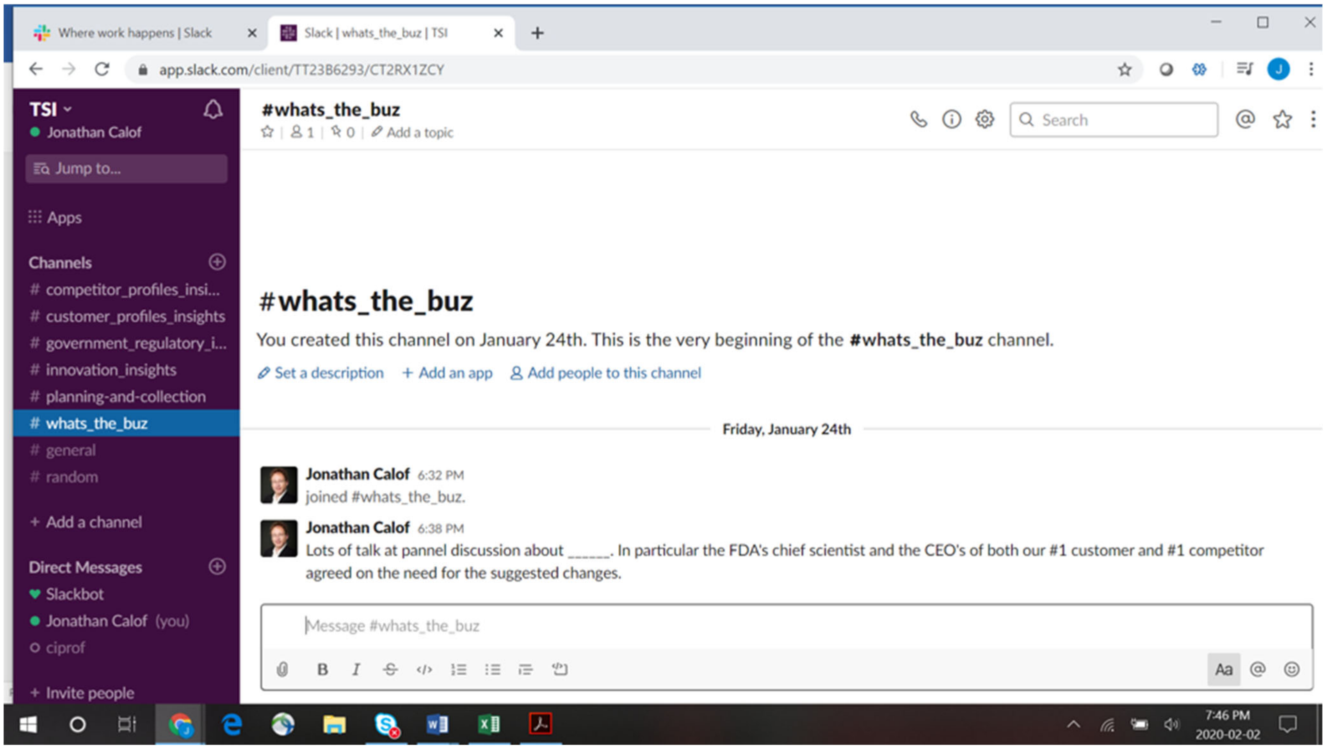
- **What's the buzz.** This last channel is one of my favorites at shows as it ensures no matter how focused the team is, everyone's eyes and ears are open to things that are creating a buzz. I put a message in that one about a panel discussion I attended at a show that buzzed with key customers and competitors. In fact, many of the attendees were talking about it that evening at one of the events.

I can invite anyone I want to be part of the workspace. Those invited can be allowed to upload/view material in all channels, or I can restrict the channels each user can access. You may recall from my column, "Working with Friendlies", that there are many, many people at a show who can help you in your intelligence efforts, so this is an easy way to create a space for all of them to enter what they've gathered. The page can be a simple blank sheet, like the "what's the buzz" channel where people simply enter their comments, or I can integrate surveys, profile forms, and the like. I can even link in Survey Monkey and other analysis platforms. There are a lot of apps for Slack.

For Alysse's TSI workspace, she chose to have each channel as a separate intelligence topic. In each of these channels, she entered some of the information she had on the key intelligence topics (KITs) and instructions on what was needed (what needed validation, what new information was needed, etc.). Employees from her company were then asked to become part of the team (regardless of whether they were formally part of CI) and contribute to the channel they had particular expertise in.

Given security concerns around the fact that many employees were reading the materials in the channels (Alysse believes in a more open approach, rather than private channels), not all information Alysse had was put into the Slack TSI workspace.

Figure 4: Calof's TSI Slack Space



At the show, when employees and others who were part of Alysse's TSI slack "team" came into contact with the information specified in the KIT channel, they uploaded it. There were no format rules or requirements for how to format the information for uploading – it could be comments made, pictures, documents picked up at a booth, recordings, and so on. The key for Alysse was to keep it simple so that anyone, regardless of technical competence, could contribute. This meant no forms to fill in and no conclusions or insights for the person with the information to have to put into the channel. The person could simply put in the information needed in whatever format they had. The channel itself was also designed with simplicity in mind, similar to what you saw in Figure 4 under "whats_the_buz".

From a management perspective, Alysse looked over all the information in the channel (each KIT) every morning and, based on her assessment, made changes to the information requirements, including deeming the KIT complete. With Slack's automatic messaging function, the entire team was informed automatically of any changes, including new requirements. The team was also informed when new information was uploaded.

Slack is not just a collaboration space with shared files and information. It also allows for all members to be updated when changes are made and messages can be sent within the application.

To keep her team engaged, Alysse put in fun facts designed to stimulate learning and keep people entertained during the show. I asked Alysse for an example of this. She replied:

> ***"It is not uncommon at cybersecurity conferences for competitors to engage in unconventional and even unprofessional tactics to attract attention. I make a point to capture these moments on Slack to keep the team engaged and motivated, as well as remind them to maintain high ethics and professionalism during primary collection. Typically, this includes pictures of what I witnessed or memes to poke fun of bad behavior seen by the competition."***

For Alysse, Slack is primarily a way to organize activities at the show, enable members of the workspace to share the information they gather, and communicate with her team. Because the team has many non-CI people, things have to be kept simple and tips/guidance need to be provided.

YOUR SLACK WORKSPACE

Box 1: What is Slack? (Source: https://slack.com/intl/en-fr/help/articles/115004071768-What-is-Slack-)

A Slack workspace is made up of channels, where team members can communicate and work together. Keep reading to learn about four key features of Slack.

Organized conversations

In Slack, team members send messages and share files in channels. Create channels for teams, projects, office locations, or anything else that's relevant to your organization. You can make channels private for conversations that shouldn't be open to all members, or you can use shared channels to collaborate with an organization other than your own.

Searchable history

When messages and files are shared in public channels, information flows transparently throughout Slack. You can search your team's conversation history in Slack to find relevant messages, files, channels, and people. With Slack's searchable history, conversations can become common institutional knowledge.

Connected apps

Add apps to your workspace to connect services or tools you're already using to Slack. With the right apps installed, you can do your work without ever leaving your Slack workspace. Find thousands of apps to help you stay productive, organized, and efficient in the Slack App Directory.

Slack calls

You can start a voice or video call with any other members of your workspace right from Slack. Share your screen to show your teammates exactly what you see on your computer — you can even draw on your screen while you're screen sharing.

CONCLUSIONS

The amount of information you can get from a show continues to grow and, with it, the opportunity for developing valuable intelligence. At the same time, there is continual development in the software that can help us at trade shows. Whether it is analytics software, such as sentiment analysis/word mapping, and emerging AI software that helps you make sense of the information or organizing platforms such as Slack, all elements of the CI cycle now have software that can help at events. This issue's column has highlighted a few of these, and there are a lot more TSI electronic enablers out there (and lots more to come). Readers are encouraged to continue learning about CI-enabling software which will help you maximize event intelligence opportunities. Perhaps this can become an event intelligence KIT for you to run in the future at CI and CI-related trade shows, which you can learn about developments in CI software from your CI peers and the vendors at these shows.

See you virtually!!!!!

RESOURCES

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’Tis the Season To Do CI

Competitive Intelligence Magazine, October–December 2013

This issue of Competitive Intelligence Magazine coincides with the holiday season – Christmas, New Year and Chanukah – so I will focus on the event intelligence opportunities provided by the season.

> ***“’Tis the season to do CI, Fa la la la la la la la la”, or “O Chanukah O Chanukah, Come light the menorah, let’s have a party, we’ll gather data. Gather round the tables and we’ll give you a treat, then we’ll have a conversation, the insights will be neat.”***

For me, as I am sure it is for many of you, this is my favorite time of the year. Most days are joyous, with celebrations and parties. I get to see people I have not seen for a while; we catch up and renew our acquaintance. I love to learn and this is a time when I learn a lot. It is a time when organizations’ employees get together in the spirit of celebrating, when many customers, suppliers, and others are invited to partake in corporate cheer. It’s a time when you, the intelligence practitioner, find yourself invited to many seasonal events (I hope). It’s time to party but, as the column will make clear, it’s also prime time for competitive intelligence – done ethically!!!!

THE OPPORTUNITY

The holiday season is very similar to trade shows. Lots of people are included who are definitely there to talk – it is, after all, a party. But even better than a trade show, you and your organization have a say in who is invited. Also, unlike a trade show, there really is no issue regarding how many of your own employees are at the event. I have made the case in previous columns for bringing to events people who have the contextual knowledge of the KIT as they fully understand the pertinent information (for example, an engineer or a scientist when doing technical intelligence, or someone from human resources when looking at sourcing intelligence). I have been told by SCIP members that budget constraints limit their ability to bring these experts to an event, but the office party is different as they are supposed to be there.

So, what you have is a lot of people around who want to talk and ask questions, and you have the ability to invite more people to the party. There is even an opportunity to further develop your organization’s information network as friendly people abound during these events. The opportunity, therefore, is collection and intelligence program development.

THE RISK

There are two major risks:

- (The obvious one) that you will lose the opportunity by not being properly organized.
- That you will not act in an ethical manner.

Regarding the latter, be very careful how you use seasonal events in the intelligence process. If you are perceived to be taking advantage of people (especially if they are drinking) or misrepresenting yourself, it could actually hurt your intelligence efforts and damage your credibility and reputation.

With the opportunity being so large and being aware of the risks, I offer some seasonal event recommendations.

Find your party targets for information collection. You have established intelligence topics, intelligence, and information needs. Now it's time to look at them in the context of the events that your organization will be hosting.

For your office party, try getting a look at the invite list in advance and match it to intelligence needs. We all get a bunch of holiday party invites and know there are basic lists that all organizations maintain. Take a look at the list, identify who will be there who could be of help in your intelligence efforts, and make a note of their names.

If you can, recommend others that you would like to have invited to the event. These could be key customers, industry experts, and others who are known for their insight into those issues that are critical to your organization's intelligence needs.

There are also some people in your organization who have important information for your intelligence efforts and are worth talking to. Make a note of them as well.

This is the key part: once you have a sense of who will be invited to the event (and those who you are able to get invited), send out a message to them, let them know that you will be at the event and are looking forward to getting together with them. This creates the opportunity for you to get together with them.

The final action item for the target phase is to ensure that you have proper profiles of those people you wish to talk to. A lot of information goes into profiles. Knowing a person by name and appearance, as well as their likes and dislikes, will help establish proper connections.

Develop your event intelligence team and procedures. Most SCIP members come from small (one- or two-person) CI teams. With all the targets identified above, you will need some help. Here are a few tips:

Identify who in your network will be a good collection ally for the event. This, by the way, is a great opportunity to develop the intelligence capacity at your organization by bringing others into your efforts. Start thinking about assigning them specific interview targets. SCIP has excellent material on effective interviewing; the literature on elicitation is extremely valuable. The practice has come a long way since John Nolan introduced it to the CI community, but the best interviews tend to be between people with a lot of commonality, between people with similar subject matter expertise/perspectives, between people who are from the same network.

Once you get people's commitment to help you with the party, you can get together with them and list the targets and start the assignment process. If you have a team, it is advisable to get their assistance for developing the profiles and contacting the targets.

Develop guidelines and protocols for your team members. It's a holiday party and people are there to have fun. Unlike trade shows and conferences where you can't afford to waste valuable collection time, you don't want to turn what is supposed to be the most fun event of the year into a big work assignment. Balance protocols and assignments with what the event is meant for. During trade shows and conferences, I have a no-alcohol rule for my team, but during the office holiday party, well, let's just say, "'Tis the season to be jolly" – in moderation, of course. One final word on the guidelines and procedures: ethics are top of mind for me, so this needs to be integrated into this phase as well.

Set up a meeting schedule for the event. At one event that I was "party" to, I suggested that the people conducting the interviews get together four times during the evening with the quarterback. The time was spent reviewing how well the collection was progressing and any problems that were occurring, including if the person whom they were assigned was being uncooperative. In the latter case, the interview was reassigned to another member of the team. The final get-together was at the end of the evening, aimed at going over the insights that the team members had obtained, the information they had collected. This also provided the opportunity for debriefing and learning from one another. I know we are tired at night after an event, but that is the best time to gather.

HANDLING OTHER SEASONAL EVENTS

Event intelligence is generally about you or others from your organization going to events and taking advantage of the collection opportunities that these events present. Seasonal parties need to be looked at in the same way. See if you can find out what events others have been invited to and enlist their help in collecting while there. Again, remember that the focus of these events is fun and celebration. Be sure to only ask them to pick up a few pieces of information; otherwise, not only will you get resistance from your own organization, but it could set off alarm bells at the event if they ask too many questions. I have found that with what I call "helpers", it is best to ask who they plan to talk to at the event and then ask them if they could ask one or two questions on your behalf.

"Be organized" is the mantra of the competitive intelligence professional. Take advantage of event opportunities. The objective of this particular type of event is to have fun, which leads me to my last piece of advice – use the event to help educate people about CI and to get them into your network. Rather than use the event to collect information (a one-off function), think about using the event to establish a network.

Erik Glitman summed it up well in his chapter in the Competitive Intelligence Foundation's book, Conference and Trade Show Intelligence:

> ***"A key element is to focus your trade show effort on building relationships that can produce information long after the show itself has ended. By looking at the trade show as a networking event as well as a collection event, you can be more effective in the data collection and face fewer objections to the data collection."***

Review all the tips I have given you in this column and instead of looking at them as the information you now need to gather for my KITs, take Erik Glitman's advice and ask: Who are the people I need to develop a relationship with, who will help me now and in the future? Who do I want to bring into my intelligence network? Have a drink with them. Now, that is a true party and a great way to apply the event intelligence process. It can even have a profound impact on the handling of other seasonal events, as the objective now is to meet the right people and cultivate the relationships that you and your organization can use after the event has ended. Do this and you will be singing a CI version of Auld Lang Syne:

> ***Should old acquaintance NOT be forgot, and ALWAYS brought to mind;***
>
> ***Should old acquaintance NOT be forgot, for CI and Auld Lang Syne!***

Have a happy and healthy holiday season, and may this year bring about much success in your intelligence programs.

Being Ready for a Scientific Conference: The Intelligence Approach

Competitive Intelligence Magazine, January/February 2009

I recently returned from a two-day "scientific" symposium titled "Future-oriented Technology Analysis (FTA)", held in Seville, Spain. This event was not a trade show with booths and visitors, but a standard two-day conference with 180 registered delegates. We could attend any one of five concurrent sessions offered several times a day with a few plenary sessions attended by all, a couple of keynote speeches, four coffee breaks, two workshops, two lunches, and one evening reception. Hosted by the Institute for Prospective Technical Studies and sponsored by the European Economic Union (EEU), this event brought together government leaders, FTA practitioners, and corporate and academic practitioners.

On the last day of the event, several participants lamented that although the conference had been fun, they did not gain from it what they needed. Over and over, I heard the question: "How am I going to explain this when I get back to the office?" These individuals dutifully sat in session tracks that matched their interests on paper, only to discover that the presentations were not in fact what they had expected or needed. They were also disappointed that the conference was almost over and they had not met some of the people who were key to their FTA program success. For the most part, the participants at the FTA conference did not waste their time. Despite the lure of Seville, they were at the event for the whole time that it was open.

Because I followed the trade show intelligence model, my experience at the FTA event was completely different and highly productive. This column will show you how a general event intelligence model can and should be applied to scientific symposia and conferences.

EVENT PREPARATION QUESTIONS

When I talked to those individuals at the event who were not happy with what they had experienced, I naturally asked them about their preparation for it. Consider the following questions as starting points for your conference event intelligence program.

Did you go over the outline of the program?

All participants answered yes. They looked over the session descriptions and chose sessions and events that they felt met their FTA needs. This was a very good answer for event intelligence.

Did you have a list of requirements for the event when you went over the outline?

Again, I received an affirmative response. All had thought about what they needed to learn at the event to help them do a better job. Several had taken the program description and sat down with their managers. They had also asked others in their organization to discuss how the event could help the organization's intelligence and FTA needs. They even went so far as to identify the presenters they wanted to meet during the event. I was pleased with their preparation. They had developed a plan for attending sessions based on real intelligence needs and a list of people they wanted to meet.

Did you go through all the pre-event materials before or during the event?

Their standard response was, "What do you mean?" Here's where their planning fell apart. Most participants thought that all they needed to do was read through session descriptions. Many also believed that the descriptions were the only information available. But prior to the event, all session presentations and papers had been posted on the conference website.

Why were these materials important? One person indicated that according to the conference descriptions, the session track titled "The Use and Impact of FTA for Policy and Decision-Making" was exactly what he was looking for, since he needed to hear good corporate and government stories of FTA and intelligence producing decisions and action. But when he went to the sessions, the speakers presented lessons learned from failure.

A review of online materials (presentations and papers) would have clarified this for him in advance. This participant also would have learned that many of the sessions presenting FTA success stories appeared in other tracks.

Did you contact the people you wanted to meet before the event?

This elicited a similar blank look from the people I talked to. "How would I do that?" Well, thanks to the papers and presentations on the conference website, participants had access to the presenters' email addresses. Plus, just as at a SCIP conference, all participants received on the first day of the symposium a list of individuals who registered for the event, along with their contact information.

It's so critical to contact people you want to learn from at these events. Sometimes you can obtain the information you need directly from them. If you want face time with them, contact them in advance and arrange a meeting, as they may not have much discretionary time at the event.

Did you share your plan with others?

Several replied, "Why would I do that?" I told them that they could enlist their friends' help in advance, especially if two valuable sessions were scheduled at the same time or if they needed an introduction to someone their friends knew. Fortunately, one of the participants I talked to at the beginning of the program shared her information needs with me. This allowed me to set her up to meet with the right people.

Sharing your information needs and interview targets with others at the event allows your friends – those individuals who care about your success – to help you execute your plan. Like any good Canadian, I was eager to help others and set up countless meetings.

So, why were some people unhappy on the last day of the event? While they thought the titles matched their information needs, the sessions they attended presented little of the material required to meet such needs. As for the people they wanted to meet, they either could not find them or they could not get face time with them. In some cases, they simply did not know who the right people were. Although they planned their time based on session descriptions and reviewed the materials to some extent, they did not go deep enough. They did not look at all the pre-conference materials.

APPLYING EVENT INTELLIGENCE

Now let's contrast their unproductive experiences with the more productive experience I had as a practitioner of event intelligence.

This was my first time at this particular event. Although FTA and intelligence are related, their communities are completely different. Because I had had previous dealings with only a few of the group of 180 participants, this was bound to be a new networking experience for me.

Before the Event: Set Goals

I had set some very important goals for this event:

- ***Present a paper.*** I needed quality feedback from the community to ensure that my presentation was taking the right direction. This was my first real contact with this community, and first impressions count.

- ***Organize a roundtable.*** My FTA roundtable was to feature prominent officials from the field. I needed to identify others who should be included in the process, gauge their interest, and convince them to come. I also had a main client participating in the roundtable event and needed planning time with them.

- ***Gather general information.*** I wanted to learn more about FTA. I could have simply read the materials, but I wanted to get a sense of what direction it was taking from the experts in the field.

- ***Develop a network.*** I needed to develop an appropriate global network to become more involved in this field. This network would include corporate practitioners, government representatives, and academic professionals.

- ***Obtain validation of FTA (foresight) impact.*** I am constantly looking for evidence that FTA and intelligence lead to good decisions.

Keeping these five key requirements in mind, I looked over all the pre-show materials – the papers and the presentations. I talked to someone I knew who was on the event's organizing committee. These preliminary efforts allowed me to develop a list of the sessions and presenters that matched my five requirements. Since those in the FTA field really did not know me, I decided to find the connection points for the people I wanted to meet. I looked for background information on them which would allow me to talk to them at the event. I also talked to several people I knew who planned to attend the event. They agreed to introduce me to some of my target people.

At the Event

On the first morning of the event, I arrived early to allow sufficient time to look over the delegate list. (You can't always obtain it in advance.) I made a list of the people who matched my objectives so that I could seek them out. I also identified which sessions had been cancelled (in most cases because the presenters did not show up). In all, I identified over 20 people I needed to see. From that list I had already made arrangements to meet five of them and for friends to introduce me to eight others. The rest I planned to contact at the event. It was a workable list. I also identified several sessions I would attend that matched my intelligence objectives. In those few cases where session presenters failed to show, I later sent an email to them.

I had one more person to meet on the last day of the event. Although behind the scenes for most of the symposium, this person moderated the final session. This made things difficult but not impossible. Thanks to a connection with him through a mutual friend, I simply made my way to the front of the room after the final session. I introduced myself, mentioned the friend, and thanked him for the email he had sent me two years earlier. With this I established a direct link between us and I could then email him after the event to obtain the information I needed.

During the event, I made time to review my requirements list and create action targets for the event. Whom did I need to meet? What did I need to do? I updated my list frequently. I used my growing network at the event to my advantage and was very happy to help others in turn.

The Result

After creating and executing a thorough intelligence plan for the event, I came up with my goal scorecard.

- ***Validate paper findings and establish reputation.*** SUCCESS. Nearly half the session chairs and organizers in the final panel session made positive mention of my paper. People approached me with validation information. I also received several emails after the event with materials validating the paper's findings.

- ***Organize FTA roundtable.*** SUCCESS. We found time before the event to hold a pre-roundtable meeting and, based on everyone's input, we changed the structure somewhat.

- ***General information on the direction of the field.*** SUCCESS. By listening to people's questions, I was able to piece together the major debates in the field. Surprisingly, it was not as well defined as I thought it would be. FTA shares many of the definitional issues that we grapple with in intelligence.

- ***Develop a network.*** SUCCESS. This was an amazingly friendly group. Being prepared with proper profiles certainly helped. I look forward to meeting and working with my new friends. I have received several invitations already.

- ***Obtain validation of FTA (foresight impact).*** SUCCESS. Several of the business cards I received were from individuals who have success and impact stories to offer. While they did not present these stories at the event, they are prepared to share them with me.

Could I have accomplished more at the event? Probably. But then again, I left the FTA event with a great feeling of accomplishment and a good story to tell about how the event intelligence model is integral to more than just trade shows and exhibitions.

Box 1: Sample program details for one time slot – paper and presentation download links were available

Theme 1

- Methods and tools contributing to FTA. Chair: Philine Warnke. Rapporteurs: Annele Eerola, Fabiana Scapolo.
- Real-time Delphi as a tool for scenario building: A case report on an aeronautical firm: Balaguer, Denis L.; Bezerra, José Eduardo de C.; Silva, Rodrigo C.
- Backcasting for sustainability in the Netherlands: Impacts after ten years, policy relevance and a methodological framework: Quist, J.
- Exploration of sector level roadmaps: Price, S.; Summers, R.

Theme 2

- The use and impact of FTA for policy and decision-making. Chair: Helena Acheson. Rapporteurs: Attila Havas, Jack Smith.
- Critical success factors for government-led foresight: Calof, Jonathan; Smith, Jack.
- FinnSight 2015 – a foresight exercise for the shaping of national strategies: Salo, A., Brummer, V.; Könnölä, T.
- The BMBF foresight process: Cuhls, K.; Beyer-Kutzner, A.; Bode, O.; Ganz, W.; Warnke, P.

Theme 3

- FTA in research and innovation. Chair: Ron Johnston. Rapporteurs: Jennifer Harper, Luke Georghiou.
- Methodology of foresight projects in strategic areas on the basis of the National Foresight Programme "Polska 2020": Mazurkiewicz, A.; Poteralska, B.
- Evaluation of Indonesian technology roadmapping initiatives: Lessons learned towards local innovation system development: Pantjadarma, D.

Theme 4

- FTA and equity: New approaches to governance. Chair: Gary Kass. Rapporteurs: Cristiano Cagnin, Özcan Saritas.
- Demand articulation in emerging technologies: Intermediary user organizations as loci for multiple stakeholder FTA? Boon, W.P.C.; Moors, E.H.M.
- Reducing the democratic deficit in institutional foresight programs: A case for critical systems thinking in nanotechnology: Loveridge, D.; Saritas, Ö.

Party Till You Learn: Where You Do Event Intelligence

Competitive Intelligence Magazine, January–March 2010

Back to basics. Competitive intelligence provides support for your organization's key decisions by providing timely assessment of factors in the external environment that affect your organization's performance and are beyond your direct control, such as customers, competitors, technology, government, etc. Trade shows have given me the opportunity to gain unique insights into the environment and these insights have given rise to the intelligence needed to support new product development, new customer identification, partner identification, and much more.

Why are conferences so great for intelligence collection?

1. **Everyone is there**. Customers, competitors, regulators – all these people possess the information you need for developing intelligence. It's your external environment all in one place. It is the industry value chain, the information value chain.

2. **People want to talk**. People attend events with the objective of exchanging information. The word is trade "show", not trade "protect." Enough said.

3. **They are relaxed**. Hey, it's a fun environment; people are generally glad to be there and away from the office.

In a previous article I showed how, if you are organized, three days at a show can provide you with more useful information than you could gather in one year at other venues. Trade shows have been found to be a cost-effective and efficient source of unique information. In short, trade show intelligence has opened up a world of opportunities for those who conduct it properly.

A SLIGHT CHANGE IN APPROACH

Over the past few months, my thinking about trade shows has changed slightly. Here are two short examples (situations) that illustrate why.

In the first situation, I was working on a project for nanotechnology, and one of the key intelligence topics was examining potential areas for nanotechnology application. At this particular event, I overheard and then joined a rather animated and lengthy discussion on where nanotechnology could be used in construction materials.

In the second situation, I was dealing with the complex task of identifying the requirements for accessing a particular foreign market. At this event, a table of six "experts" were engaged in a heated discussion about how that particular environment had changed. I learned a lot and was able to interject the odd question within this group.

Here is what is different: the first situation was at a hockey game, while the second was at a synagogue (Jewish place of worship) in that particular market. I have acquired a great deal of intelligence at untraditional locations like these two. In fact, I developed much of my initial knowledge about the oil and gas sector while taking a bus to a Calgary Flames hockey game – many senior industry executives take a bus to these games.

Why was I able to get so much useful information at these events? I discovered that the same basic conditions that make trade shows such an excellent place for gathering information made these locations equally great: many people gather together, and a relaxing environment encourages people to talk. I realized it's not strictly about conference and trade show intelligence, but more of "social intelligence". Basically, any place where people gather in a relaxed environment provides a unique opportunity to collect information. With this expanded definition, almost any social gathering can be turned into an intelligence opportunity.

A SOCIAL EVENT

I tried applying this approach with a client at a party. The client's organization was planning a party to introduce a new senior employee to the local business community. I recognized that this was also a social environment where many people would gather and would be eager to talk in a relaxed atmosphere. So, I worked with the client to turn this party into an intelligence opportunity. Part of the planning for this effort included inviting the "right people" – unlike a conference or trade show, when you host a party you control who is invited and to a certain extent who comes.

The intelligence side of developing the guest list consisted of two efforts:

4. **Look at who traditionally will be invited** (most organizations have standard lists for these events which change only slightly over time) **and overlay the guest list with the organization's intelligence objectives.** Who on the existing invitation list is likely to have the information you require?

5. **Identify people not initially on the list but who should be invited** because they would reasonably be expected to have access to the information the company needs.

With the modified guest list in hand, the next phase focused on planning and logistics. These activities are similar to those required for other event programs (see my previous articles in CIM). Here are three of the most important activities:

6. **Identify individuals within the organization who can hold relevant discussions with the targeted individuals**. How many you require is determined by the number of people who should be interviewed. Unlike a trade show, which has a high cost associated with sending extra people to it, there's not much cost associated with inviting a few extra company employees to the event. The individual employee backgrounds you require for these individuals (R&D, marketing, human resources, etc.) can be based on the project's key intelligence topics.

7. **Set up meeting times for debriefing the intelligence team during the party**. For example, I suggested that the people conducting the interviews meet with the project's intelligence quarterback three times during the event. The time would be spent quickly reviewing how well the intelligence collection process was going, identifying any problems that were occurring, and determining if any person or topic needed additional support. Given that the event (party) lasted only a few hours, having these short meetings were critical to ensure that the activity remained on track. For example, we decided to change who was interviewing certain key targets – we swapped assignments.

8. **Develop an intelligence collection plan**. Be clear about what you want to know and who is most likely to have that information. Also, ensure that the interview tasks are allocated to the right people.

In short, we conducted an event intelligence program at a specific company event.

So, here is my message to those interested in event intelligence: whenever people come together in a relaxing environment that encourages talk, event intelligence can be applied. This approach generates many implications for action:

9. **Start making a list of all the "events"** you and others in your organization attend that could provide this kind of opportunity.

10. **Be prepared**. Opportunities for event intelligence sometimes appear unexpectedly, so keep your organization's key intelligence topics current and available, and always be ready to drop into collection-ready mode. I have been put into social situations when I did not expect the opportunity to appear, but it did. For example, a great opportunity arose a few months ago when my flight from Europe was delayed by eight hours. A group of people whom I didn't know were sitting around a table talking about their areas of expertise for those eight hours, as they had nothing else to do. It was a great opportunity and I learned a lot.

11. **Create awareness** in your organization about the intelligence that can be acquired at social events. Make sure you also emphasize the importance of CI ethics. Given the growth in social networking (both online and in person), you should have a willing audience.

Expand your definition of what an event is and you will find many opportunities for collecting the information that your organization needs. Time to collect in all kinds of social environments. Time to "party till you learn" (tm, Calof).

Who Should You Bring to Events?

Competitive Intelligence Magazine, September–December 2009

In my never-ending quest to turn trade shows and other events into intelligence investments rather than marketing costs, I have added one more element: Who do you bring to events?

When I give my intelligence seminars and I come to the topic of collecting information, I start by asking the question: If you can pick someone to conduct interviewing, which of these people would you bring?

- ***An expert at* interviewing.** This person has had specialized training in obtaining information from individuals – for example, someone who has gone through the John Nolan elicitation workshop.

- **A subject matter expert**. This person has specific subject knowledge related to the information being collected. For example, if the key intelligence topic involves technology, they could be a scientist or engineer; if it's about recruiting or identifying good human resource sourcing policies, they could come from the human resource section of the company, and so forth.

- **Someone who knows the interview target.** This individual has some personal connection to a specific person who will be interviewed. For example, they could be friends, could have previously met at an event, or could have an organizational relationship.

Of course, the most common answer is "all of the above", but I again ask them to pick one person. From a competitive intelligence (CI) perspective, the common answer is to take an interviewing expert to the conference. CI practitioners are taught how to conduct interviews, how to profile the target, and how to maximize the chances of interview success. We also understand the intelligence context of the information, since that drives the type of information we are collecting. However, let me offer, through two short stories, another perspective on why the other two answers are equally valid.

THE BIOTECHNOLOGY SHOW

As part of an integrated event intelligence program that I was quarterbacking, one of the team members engaged a company officer from Asia in a discussion about their needs. They had a highly technical discussion, and he returned very excited about the requirement to identify an opportunity in wet labs – during the discussion the Asian executive had indicated concern about obtaining wet lab space.

I first asked this collector how this information would be applied – what management decision would it affect? He said that given the clear demand, the outcome would be to obtain authorization to develop a wet lab program in Asia. I then asked him: "Exactly what are wet labs?" His answer: "I don't know, but it's an opportunity."

This answer raised a large red flag over the project. So I spoke to a scientist I know and asked her to do a second interview with the Asian executive to confirm the validity of this opportunity. After returning from the interview, she reported that there was no opportunity, as the Asian manager was simply complaining about the company not authorizing the funds for him to use existing wet lab space. In fact, she said there is apparently an excess of wet lab space in that area (she had confirmed this with another scientist).

Did this contradict the information obtained in the initial collection efforts? Both were reporting on the same conversation. But while the first collector had superb interviewing skills, his lack of technical knowledge in the area resulted in:

- An inability to interpret the information he was hearing in the interview.
- No frame of reference for asking follow-up questions to identify whether or not there was a true opportunity.

As a result, his assessment of the information resulted in a very wrong conclusion.

THE CI DIRECTOR'S CONCERN

The director of a competitive intelligence department in a well-known company (that I cannot name) recently approached me with an interesting concern:

> ***"My company's products are getting far more technical, and frankly I don't understand half the information I'm reading. Can I be an effective head of intelligence if I don't truly understand our products?"***

My answer was that as a manager, you are a manager (a very important role in CI). You run the CI operation – you don't collect and assess information; you motivate and train the people who do this. However, you had better make sure that your analysts have the necessary (industry) knowledge to interpret the technical data.

What both examples show is how difficult it can be to not only gather the right information to support the intelligence effort but also understand its basic meaning if you don't have the contextual technical background.

One last story from a trade show and then I will get to the point.

GOVERNMENT TRADE SHOW COLLECTION

I was working at a trade show collecting information on behalf of a government client. At another government's booth, I was seeking information about what appeared to be an innovative program they were running. I asked them questions about the program and why they structured it so much differently than similar programs I had seen in other countries around the world. I received a very interesting answer.

But part of the way through the discussion, the person I was interviewing asked what organization I represented. My ethics required that I identify the client that I was working for, the organization that would be receiving my information. “Ah,” said the person, “so you work for government. In that case, let me tell you the truth…” As I represented another government office, he felt an obligation to fully inform me why his government had designed the program that specific way. If I had been collecting information for a corporate client, he would have told me another story.

What I learned from that exchange was that no matter how experienced you are in applying interviewing techniques, there is nothing more powerful than commonality to open up a conversation. This is at the center of many effective interviewing techniques that I use. It also underpins much of the advice I give my clients.

There are two common threads in these stories:

- How a perceived affiliation or common expertise can more effectively generate accurate information.

- How having the subject matter expertise can result in better interviewing and interpretation of the data collected.

There is a significant advantage to using the services of interviewers who either know the target or are subject matter experts themselves. When you put your event intelligence plans together, think about the contribution that experts such as scientists, human resource experts, executives, and accountants can make to both the collection and assessment of information. Identify if there are people within your organization or within your personal network who have subject matter expertise which in turn can help you collect and interpret the data.

EFFECT ON CI

How does this affect the value of a CI professional? Rather than making it sound like it does us out of a job, it suggests in fact a rather exciting enhancement of what we can (and should) do.

- **Identify the correct people for the event**. Think of identifying people who traditionally do not go to the show and bring them.

- **Train people who are attending the show**. In one Japanese company, all their employees received basic intelligence training. One of their staff in R&D (who had been one of my undergraduate business students) received specific training for an upcoming trade show and was given a list of questions and targets to focus on.

- **Include subject matter experts**. Have these experts on call to provide context for your collection efforts and help with the analysis. At some shows, we have put together a home assessment team. These few people back at headquarters are experts we can consult with about the best approaches for data collection and interpretation of the results.

Putting R&D into Your Event Intelligence Program

Competitive Intelligence Magazine, April–June 2013

In my last column, I prepared SCIP members for the annual conference but, as many noted, I was not there in Orlando. It was by all accounts an extraordinary opportunity for all who prepared properly for event intelligence. However, I was in London, England on a very exciting project that I will write about soon.

During my trip I met with Sir Alan Rudge, a very distinguished and insightful engineer. Sir Alan is a former chairman of the Engineering and Physical Sciences Research Council, a past president of the Institution of Electrical Engineers and chairman of the Engineering Council. He has served on a number of national committees, including the government's Advisory Committee on Science and Technology, and he was also a senior executive with various telecommunications companies. If ever someone was the living embodiment of a competitive technical intelligence expert (even though he is not part of the competitive intelligence community), he is that person. Sir Alan was telling me about how one should use research and development (R&D team), in a sense, as a source of good technical intelligence:

> ***"A good R&D team is not only valuable for their developments, but as an antenna to all that is going on in their field. Every new threat can become an opportunity if you are aware of it in a timely fashion. At British Telecom we built a marketing center for the company in the center of our R&D labs campus. The theme for visiting customers was we do not have to be worried by the technology change. We look after your future."***

CONSTANT TECHNOLOGICAL CHANGE

In the work that I am doing, Sir Alan's statement was relevant on two fronts:

- I work with many small and medium-sized companies that cannot afford big, expensive research programs, so staying ahead in the ever-changing technology landscape is a major challenge. If Sir Alan is right, then R&D staff can be "aware of opportunities and threats in a timely manner". So, the integration of engineers and scientists into an intelligence program makes a lot of sense.

- I have written much about how important it is to bring the "right" people to your events (for example, see my column in September 2009).

Conceptually, an extension of what Sir Alan is saying may be to include these people at these events, as they are the "antenna to all that is going on in their field".

Any SCIP member interested in technical intelligence would have been as intrigued as I was by this discussion. His reference to "an antenna" should strike everyone as a battle cry for competitive intelligence. Imagine if you, the leader of your organization's intelligence initiative, could take Sir Alan's advice and turn your organization's R&D staff and other science types into antennas for R&D. Not a bad way to prove the worth of intelligence, especially in those industries where technology keeps changing (which I would think is most industries).

R&D STAFF AT A BIOTECH EVENT

Let's overlay the idea of R&D-focused intelligence using R&D staff in an event intelligence program. To demonstrate this, I will take you through the wheel of intelligence for a biotechnology event.

Planning

Part of the problem with supporting S&T (science and technology)-type intelligence topics is that few of us truly understand all the technical aspects of the technical landscape. One SCIP member who heads the intelligence program in a major technology company asked me: "Is it possible to lead this intelligence unit when I don't really understand the technology?" My answer was: "Of course, but you will need to bring the technical staff into your process."

Where do they fit? First off, they simply know what to look for. I may not understand the subtle difference between the 3-hydroxypropioninc acid and 4-hydroxybutyrate or the impact on competitiveness when using Caldicellulosiruptor Saccharolyticus to make biodiesel (you can thank my son Andrew, the Princeton chemical engineering student, for helping me through that one), but my engineer does. I am now convinced that I will need to include, in my intelligence investigation at bio2013 and other shows, team members with technical understanding. These individuals can tell me exactly what I should be looking for that provides indicators of significant changes in the R&D landscape. Without this targeting from my engineer, I simply would have asked: "Any changes happening? What are the emerging areas in biofuel research?" Now, I understand what to look for.

Even better, the R&D staff also know the people to talk to at the event who would have information relevant to an R&D intelligence program. I know the marketing types and I know the companies, but they have a better sense of who the true opinion leaders are in S&T fields. They know who the right government scientists or university professors are to talk to, and they can tell me who the true R&D brains are in my supplier, customer, or competitor organizations.

The "science club" is a very tight-knit group and my R&D staff know who I should be talking to, as they are part of their network and are on their radar. So the R&D staff can help me understand what questions to ask, what to look for, and who to ask. They can also help me understand what shows I should attend to gather this kind of information. Once again, this is part of their network and knowledge base.

Collection

What type of person is better for talking to a scientist or researcher – a marketing/strategy type or a fellow scientist/engineer? Granted, if you take the SCIP certification course on collection you would be a good collector, but a science person talking to another science type is a sight to see. They speak the same language and, very importantly, they know how to interpret what is being said. Once again, this would be part of (as Sir Alan said) the scientist's antenna.

I sit on several science committees, including the Russian Foresight Committee and the Success Nexus Biofuel Technical Committee. While I appreciate being invited to these events and I admire the research talk, all I weigh in on is the need for intelligence and the foresight process. I can't hold my own in a talk about level three-based nanotechnology, although I can talk to an executive about level three-based nanotechnology commercial application.

This situation came into play during one of my events in Russia (Russnano) when I was looking at the nanotechnology scientific posters. I have written before about how valuable these poster sessions are as a source of early warnings of technology threats and opportunities. Posters generally comprise 10–15 slides on a board explaining a new research direction, and the scientist responsible for the innovation is in front of it ready to answer your questions. I looked at some of the Russnano posters and marveled at them, but my eyes also glazed over as I really had no understanding of the calculations, symbols, and other elements on the poster.

Imagine if I had had my organization's nano-scientist with me. They would have been able to direct focused questions at the poster's scientist/researcher, enabling my organization to understand the threat or opportunity presented by that emerging research program. I have been pushing companies to bring R&D staff to these conferences for this very reason.

Analysis

I can do a five-forces analysis with the best of them, and I am also familiar with patent analysis and lifecycle techniques, but add a scientist to your analysis team and marvelous results can flow. They see situations completely differently than business types, and they have their own techniques. I had five engineers with me on a project involving telecommunications technology. When we started talking about the research direction of the competitor (in terms of whether it was truly innovative or not), I initially answered no (based on my techniques) and they said yes (based on theirs).

It turned out that the engineer's techniques pointed to potential new applications in telecommunications technology that could be disruptive – something that an engineer could envision, based on the competitor's research direction, but a businessperson could not. Potential products from this research are years away, but with their input I can now see the threat that could arise from them.

The idea of bringing different perspectives to your analysis team does make sense – not simply because of the different analytical techniques that they will apply, but also because they will see things differently (Isn't that what different perspectives are all about?). For those readers who say that they can't bring any more people to the event, for this phase and the next (communication), the technical staff's involvement can be done remotely. There is no reason why technical staff cannot be involved via a Skype-based analysis session.

Communications

The objective of a technology-based intelligence program, focused on research and development, is to produce intelligence that will find its way into future products/services. Whatever is being communicated from the event will need to inform business decision-makers of the potential opportunities and threats, and what to do about them. It will also inform technology decision-making.

In the organizations I work with, before they embark on a new research or development program they talk to their technical experts. Once again, the engineer/scientist person on my team comes to the rescue. Together, we create intelligence briefings in the language of the appropriate audience. I am good at communicating to management (I know the MBA buzzwords and senior management speak), but my scientist knows how to communicate to the technical people. Not including them in the crafting of intelligence communications would be a significant mistake.

SUMMARY

I have now shown you how integrating R&D staff into the planning, collection, analysis, and communication activities around a specific event can be invaluable, but their utility extends even further than this. Turning back to Sir Alan's comments, R&D staff members are generally well networked with their counterparts in customer, competitor, and supplier organizations, universities, government research labs, among others. This network is maintained through active involvement in an association (for example, IEEE), attendance at a symposium, participation in online discussion groups, and so forth.

Also, recall that when I talk about events the definition includes more than trade shows. Since R&D staff are already part of these forums, why not utilize them in your intelligence program? They speak the language, know the capability of each event source, and can interpret for you. Consider sitting down with them and discussing how their "antenna" to the world can be tuned into your organization's technical intelligence needs.

An organization in a technical industry requires focused technical intelligence to refine R&D programs. Most companies cannot afford poorly directed research or development. Technical events (conferences, symposia, workshops, trade shows, discussion groups, etc.) provide the rich information needed for your technical intelligence program. Your R&D staff members are the antenna to the S&T world. It seems to me this is a match made in intelligence heaven.

Event Intelligence: Time to Invite your Government In

Competitive Intelligence Magazine, September–October 2007

At first glance, many readers will assume that this column is intended only for government. For readers from the public sector, it describes how government officers can design better programs, develop their own intelligence, and provide better services through conference and trade show intelligence. At another level, it is for all readers who go to trade shows. It shows how your government can give your conference and trade show intelligence program a competitive edge.

GOVERNMENT TRADE SHOW PRESENCE

In one of my early high school student jobs, I worked for the Canadian government in the department responsible for Canadian company participation at trade shows. I made the company and government signs for the Canadian pavilions at the shows. As time went by, I progressed to project management and on-site trade show management, and I became aware of just how large government (national, state, provincial, and the like) trade show budgets were.

Fast forward many years and look at my last few shows. Whether at food shows, biotech shows, or any other kind of show, you still see a huge government presence. For example, the recent Bio Technology Show (BIO) had country pavilions ranging from Argentina to the United Kingdom, and state pavilions from Alabama to West Virginia.

With a few notable exceptions, the dominant role of the government agencies at the show was organizational. Government officers booked the space, recruited the companies for the government pavilion, designed the booths (in some cases, commissioning the screening of the graphics), arranged for on-site setup and dismantling of all booths in the government pavilion, and provided a lot of handholding.

DOING MORE

Over the years, some governments did more than on-the-ground organizing. I heard about the role that Japanese and French government officials played in gathering information to help their companies. Some governments also used these events to develop their own intelligence. From these government activities I learned about the intelligence process in general and trade show intelligence in particular. I then worked on programs with the Canadian government, various provincial governments, and other foreign governments in conference and trade show intelligence.

I have seen many governments use the quarterback technique at trade shows to help the companies they bring with them to develop intelligence. I have also seen government officers use trade show intelligence for their own purposes. So, the first message for you to pass on to your government officers is the following: governments from many countries are using the conference and trade show intelligence process to help themselves and their companies.

MEASURES OF SUCCESS

Governments these days need solid results to justify any program expenditure, so their trade show programs must be successful. Of course, there are many ways to measure success. As one measure, many of the companies who were involved in the government-sponsored trade show intelligence program are now running their own event intelligence programs – they had never done so in the past. In addition, the government agencies sponsoring the programs have been awarded a variety of medals for their accomplishments. In the more traditional sense, companies have reported solid contacts and sales, as well as other opportunities arising from the trade show intelligence process.

Here are a few testimonials from government officials and others who have been part of the government trade show intelligence program:

> ***"The training, mentoring, and support at the trade show enabled me to do three months of work in four days in Houston."*** **(Association executive, Canada)**

> ***"I really enjoyed it. The process made me think carefully about what I was trying to find and what decisions needed to be made."*** **(Department of Trade and Industry, South Africa)**

> ***"This is something that can be a value to nearly everybody. It should be required of those that go to large trade shows. It is applicable to both governments and the private sector… The training allowed me to do much more at Paris Sial than I could have done under normal circumstances. The process yielded more and better information."*** **(Executive, South Africa)**

> ***"The process assisted our companies and the association itself in acquiring more reliable information in less time. It is something that we will use again and recommend to our members."*** **(Association executive, Alberta)**

UNIQUE OPPORTUNITY AND DISTINCT FAILURE

Why would any government get involved in conference and trade show intelligence? The simple answer is this: unique opportunity and distinct failure.

The opportunity

Conferences offer the greatest potential for collecting intelligence in the shortest time span for the least amount of money. This has been written many times and can be found all over the Competitive Intelligence Foundation's book, Conference and Trade Show Intelligence. If you are properly organized, you can gather more useful information during one trade show than you could ever hope to collect in a full year.

Given the collection talents exhibited by some government officers I have worked with, and their ability to access information openly and ethically because of their position, government officers are often in a position to benefit from the collection opportunities presented at trade shows.

The failure

Properly organized shows mean well-developed intelligence plans with intelligence topics, information needs, sources identified, assignments, and so forth. A conference intelligence plan developed months before the show effectively links to the organization's overall intelligence needs. In this plan, every activity occurring at the trade show (workshops, presentations, exhibits) has been carefully examined to determine its potential contribution to your organization's intelligence requirements. This extended planning process maximizes the opportunity presented by events. It ensures that you don't waste time gathering the wrong information, information that could be gathered elsewhere or even information that already resides within your organization.

Unfortunately, as past studies have demonstrated, few organizations, including some governments, have detailed intelligence plans for conferences and trade shows. When such a plan is lacking, you can attend a trade show and not obtain the information that the organization truly needs. The most basic reason for governments developing trade show intelligence capacity is to take advantage of the enormous opportunity presented by these events.

GOVERNMENT INTELLIGENCE REQUIREMENTS

Here are a few reasons for government-led trade show intelligence missions:

- To develop better programs. At one event in the biotech field, a government agency used the conference to learn what type of programming would be required to develop a local biotechnology infrastructure.
- To develop information networks for future intelligence. At another show, a government officer developed a sophisticated intelligence plan to create an information network with other government officers from around the world who were at the show, and used this network to aid future intelligence gathering.
- For current assignments. What better place than a trade show to develop insight into a new area that you have been assigned? But without a proper plan, these events can quickly become overwhelming and can waste your time.
- To assist clients. Government officers have a variety of clients, including other government officers or agencies, or companies they are trying to help. Government officers have developed detailed plans to identify what information their clients could use from these events and the best way to get this information. In these cases, they identified specific market opportunities, developed joint ventures, identified new technologies, and so forth.

The government evaluations of their trade show intelligence programs have been very positive. When officers were asked why they were so pleased with the event intelligence program results, the reasons they most frequently cited were the following:

> ***"I never realized how much I could get out of a show – this process really works."***

"It's a lot more satisfying going through the intelligence process and developing actionable, useful intelligence than simply gathering general information."

The only downside is that, once officers found out how much could be done, they tended to work way too many hours for fear of missing out on opportunities. At times, I had to ask program participants to go back to their hotel rooms and get some sleep.

Get your government officers to become familiar with the intelligence process and apply it to the many conferences and trade shows they attend. The results that other governments have obtained from the process provide ample justification for your officials developing their own program.

GOVERNMENT-LED PARTNERSHIPS

I end this column with one final element of government trade show intelligence that excites me the most: government-led conference and trade show partnerships. After learning how to do conference and trade show intelligence, governments often look to bring this capability to their local companies, associations, and others. They provide these organizations with the same training that they received for government conference and trade show intelligence and then work with the organizations at a specific trade show. Below are a few variations on this basic idea.

Training and awareness only

Companies are provided with a one-day training program on conference and trade show intelligence by a recognized expert in the field. This training uses the Competitive Intelligence Foundation's book, Conference and Trade Show Intelligence, as the core handout material in the training program. This helps companies understand the importance of trade show intelligence and how to do it.

Training, awareness, and planning assistance

In addition to training and awareness, the government and trainer assist the company in developing its own trade show intelligence plan. Plan assistance is critical for ensuring that the lessons of the program are truly learned. Training without implementing the lessons learned seldom leads to learning success.

One of the positive side effects of this approach is that government officers can identify common intelligence objectives among companies going to the same show. They can either help them get the information (see above) or get them to work together.

Training, awareness, planning assistance, and on-the-ground help

In addition to the previously listed activities, the trainer and government officer's work directly with companies at the show to help them in their intelligence efforts and to reinforce the skills and concepts needed to properly execute conference and trade show intelligence.

The approaches mentioned above ensure that the companies develop their own capabilities in conference and trade show intelligence, while also helping to build intelligence partnerships between companies and government.

Given the number of companies around the world that are doing a world-class job on trade show intelligence, many governments should want to help their companies develop similar capabilities so that they too can take advantage of these opportunities.

TAKING AN ACTIVE ROLE

Why are governments around the world taking an active role in trade show intelligence? Simply put, the benefits of a well-run conference and trade show intelligence effort are too great to ignore. Furthermore, the knowledge that other governments are providing this kind of assistance to their companies has convinced them that they do need to catch up.

With their resources and outreach potential, governments are in a unique position to bring conference and trade show intelligence capabilities to companies in their region. As governments in many countries have found, the results certainly justify the investment. In addition, the governments themselves have found that they too can benefit from a properly run conference and trade show intelligence initiative.

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Competitive Intelligence Professionals – Opportunity Alert: Your Trade Show Team Needs Your Help

Competitive Intelligence Magazine, July–September 2014

Over the past several months since I attended a trade show, I have been receiving emails from a salesperson. These emails have driven home why competitive intelligence professionals need to play a central role in their organization's event management process:

- **Email from the salesperson.** I have emailed you a few times now, with no response. I am thinking that I received your email 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's name), so I am unsure why you are contacting me about this.
- **Response from salesperson.** 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 exchange above, it is clear that the salesperson 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 for 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 that the salesperson discussed earlier, it was clear that the salesperson 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 would have been used. What does this suggest for you, the competitive intelligence professional? Where is the opportunity?

As a starting point, share this story with those in your organization responsible for events. Trade show ROI is important to organizations and something that continues to grow in importance. In today's hyper-competitive environment, all expenses are carefully 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 does not happen to your organization. Here are ways in which you can help:

1. Offer to help analyze those who go to the booth. The initial focus, which is something I mentioned in an earlier column, should be on analytics and customer profiles (Calof 2014). CI has much to contribute to this. You should offer to help the booth personnel to profile those people who come to the booth in order to arrive at 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 the topic. Event ROI can be enhanced if those who 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. Develop booth information collection plans. Customer analytics allow 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 another way, the questions needed to develop the appropriate profile where not asked. This is where CI can play a big role. What information does CI say needs to be gathered so that proper profiles and follow-up plans can be developed? Think about putting together a customer profile form that the boother 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 whether they are interested in something else (such as a competitor looking for competitor information). Barry Siskind has written a good book that provides ideas on how to assess the person who 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 Foundation's book, Conference and Trade Show Intelligence (Calof and Hohhof 2007) have several forms that readers may find helpful.

3. Facilitate data capture and storage. In terms of the exchange that took place at PITTCON, it is clear that the information I gave the booth personnel was not transmitted to the salesperson and, from what I could tell, might 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 salesperson 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 that all the salesperson got was my name and email address. That was it. What happened to all the other information I provided when I told the boother why I was there? It appeared to me, based on observations at the booth, that once the boother had answered my questions, scanned my badge and given me literature, she moved on to the next potential customer at the booth. She did make a few paper notes, but that's all. What did she do with those notes? Why was none of this transmitted to the salesperson? Why did he say he had no knowledge of what my purpose was in approaching the company?

It seems to me that it was not captured, or not stored, or nor made available to the salesperson. Or the other possibility is that the salesperson did not know how to get the information. Competitive intelligence can help by developing information capture forms and procedures, which boothers can use after they have completed 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 salesperson if he was not able to get the information needed to do a proper outreach.

4. Train staff in interviewing techniques/approaches. While the job of a boother is to push products/services and answer questions from those who visit the booth, it is also to collect the information that will help make an eventual sale. The boother needs to ask the right questions to facilitate appropriate after-show analysis and outreach to the potential customer.

Recommendation #2 (above) should help ensure that the right questions are asked and recommendation #3 should ensure that the information is stored and transmitted appropriately. But the boothers also need to know how to ask the questions and how to interview effectively, including how to read a visitor's body language. Interviewing is a popular theme in competitive intelligence literature. For example, the book, Conference and Trade Show Intelligence, 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 for them on how to interview effectively.

Profiling assistance, assistance in identifying the right information to collect, assistance in developing capture and storage systems, as well as training boothers on how to effectively interview at events are areas where the intelligence professional can provide immediate value to their organization's trade show staff.

Providing this kind of help can reduce the types of problems that I encountered at PITTCON and other trade show events. Don't let what I saw at PITTCON happen to your organization. At the same time, show how valuable you and competitive intelligence can be to your organization.

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Conference and Trade Show Planning Committees as an Intelligence Resource

Competitive Intelligence Magazine, November/December 2006

Last week was my meeting week – something that is generally not very exciting in the life of this globe-trotting, trade show intelligence columnist. But last week was different: two sets of meetings were for conferences and trade shows, on whose conference planning committees I serve.

Sitting on these committees came with an enormous workload and responsibility to ensure that the events were planned in a way that promoted the industry and members' best interests. But as I sat in these meetings, I also realized the enormous intelligence opportunities arising out of being on the planning committees. This issue's column discusses these opportunities and the advantages they provide, and aims to persuade you to become involved in conferences and trade show planning committees.

TRADE SHOW ISSUES

Over the past few years, I have found myself at trade shows and conferences complaining about various elements. See how many of them have frustrated you:

1. Finding areas of the event that were off limits except for VIP delegates, speakers (including leading company executives), and sponsors. I wished I could go there simply to find out where the top people in the industry thought the industry was going.

2. Wishing there were additional speeches, workshops and topics that directly tied into my intelligence needs. Or worse – being in a conference and, halfway through one of the sessions, wishing I could have seen the material before the event because the talks were not quite what I had hoped for, despite the title and summary in the program book.

3. Going to plenary speeches and CEO roundtables and asking myself why they could not have invited different speakers more germane to my company's interests and intelligence needs. I latched onto this when I noticed someone in the question-and- answer session asking the keynote speaker about his company's future plans. The speaker answered in a forthright manner, as speakers tend to do. It turns out that the person asking the questions wanted to become a prime supplier to the speaker's company, so the questions were really an attempt to elicit the information needed to put together a winning bid package.

4. Not receiving the list of events taking place at the conference or trade show early enough to do a proper event intelligence plan. For many of my events, I go to the web page day after day, only to see the constant "under construction" or "coming soon". I want to know who is exhibiting, where they are exhibiting, and who is talking so that I can go to my boss early enough to get the correct resources for the event and, of course, to put together a proper plan.

In short, maximum success at an event depends on putting a plan together timeously and being at an event that has the right information. Unfortunately, this tends to be hit or miss at best.

SHAPING THE EVENT

Now imagine if you could actually have a say in all the areas I just mentioned. Imagine that you are free to help shape the event and receive key information on talks one year before they happen. What if you even had the opportunity not only to select the speakers and workshops, panelists, and topics, but also to work with all participants in shaping their talks? Being on the organizing committee of an event gives you these opportunities.

GETTING INVOLVED

Getting involved in conference or trade show committees is not an easy task. You have to find out how and when the committee is formed. At one upcoming conference, members can nominate themselves for the conference committee. Then the conference chair, in consultation with others, will send out invitations to serve on the committee. In another organization, roughly six months before the conference, board members are asked if they wish to serve on the conference committee, with the conference chair making the final decisions. Some organizations have a multi-year planning cycle, in which case it is important to become involved more than a year before the event is held.

INITIAL PLANNING – SETTING THE CONFERENCE AGENDA

With one conference committee I served on, the initial planning meeting was set well before the annual conference, with a general discussion of themes, roundtables, and plenary speakers. This afforded all committee members the opportunity to provide input on the type of program they thought would be of most interest to their members.

As a devoted SCIP member and believer in business intelligence, I was pushing for a few sessions that would look at business intelligence and its nexus with government intelligence (the primary focus of the organization), and to potentially run a roundtable on security foresight (since I am also involved in foresight). This allowed me to invite some people I wanted to meet from the foresight community as well as shape a roundtable that would be of significant interest to me and, I hoped, to the organization's membership. Follow-up meetings focused on speakers to invite and possible topics.

Serving on the planning committee provided a unique opportunity to invite experts whom committee members wanted to meet to give a keynote address or serve on a panel. Given the prominence of the event, it was also a chance to invite speakers whom people were having a hard time meeting (for example, heads of intelligence agencies and leading politicians). To be sure, these people were of great interest to the organization's members as well as to specific members of the organizing committee.

Similar to other conferences, the organization's program also included special site visits. Committee members were free to suggest site visits to places that they wanted to visit and that were also of interest to members. It was a very open process with much latitude given to the committee. In the end, however, the conference chair made the final decision.

For the other conference committee I served on, the general themes were set long before the committee met. In fact, committee members were chosen based on their experience and reputation within the designated track (I was co-leader for the academic track). As such, the ability of committee members to influence the general topics was limited, but they certainly could contribute to keynote selection discussions. This organization was not alone in having conference themes set before the committee came together.

Most organizations do have a process for establishing tracks and general themes that you, as a conference committee member, can influence. So, it is worthwhile identifying the process by which an organization's conference committees are established and finding ways to influence that process.

SHAPING THE SESSIONS

For many conferences (for example, the Houston Offshore Technology Conference), potential speakers are asked to submit proposals to the conference committee. Other conferences use the organizing committee to solicit proposals from potential workshop leaders or speakers. In either case, you have an opportunity to shape the sessions. If the proposal approach is used, you shape the session directly via the selection process. Which speakers do you accept? What topics do you include? What company presentations do you accept? These issues are all within your influence as a member of the committee.

Keep in mind that your selection must be based on putting on the best possible conference for delegates, not just ensuring that you can conduct intelligence operations at the event. However, in helping to select from among the proposals, you will get very early notification of speakers, companies, and topics that can be of interest to your organization.

For many conferences, even when you do not get a chance to select the speakers or evaluate proposals, you are still encouraged to work with the speakers in shaping their material. This gives you very early warning on topics and material. This hands-on approach with speakers is not unusual – in fact, it is needed to ensure consistency in the quality of important workshops and talks.

EXHIBITORS AND DELEGATES

Who is exhibiting at the event? While planning committee members rarely have any involvement in the exhibitor process, they do generally receive updates on who has bought a booth and who has registered as a delegate. Most of the meetings that I have attended as part of conference planning committees have generally opened with this information.

AT THE SHOW

This is when I have the most fun. As a member of the organizing committee, I have a special badge that identifies me as such. This badge allows me into all VIP areas and all functions (even before they start) and is a great conversation starter. As a member of the organizing committee, you need to talk to delegates to find out how they are enjoying the show, what they would like to see the following year, and so on. You are supposed to meet with VIPs and make sure they are happy.

You can also use the opportunity to further your organization's intelligence objectives. Want to ask a speaker questions before his or her talk or after it? Want to ask questions in the exhibition hall before or after hours? As an organizer, it is not only that you may do so; it is your responsibility to do so. Again, make sure that your primary focus is on ensuring that the event is appropriate for the members (not just furthering your intelligence agenda). Also, do not misrepresent who you are (for example, your organization). Ensure that you do not violate SCIP's code of ethical conduct or your organization's code.

I hope you can see the enormous opportunities created by getting involved in conference and trade show organizing committees. While time consuming, they do afford the best opportunity for furthering your organization's intelligence efforts.

One warning: do not forget that the reason you are on the committee is to help make the conference or trade show the best possible for all members. Be sure to balance your desire to make the event focus on your needs with the obligation to look after the needs of the whole membership. If you cannot strike some sort of a balance between the two, you may not be given another chance to get involved.

Home Field Advantage at a Trade Show: A Sure-Fire Way for Developing Customer Insights Outside of the Trade Show Venue

Competitive Intelligence Magazine, Fall 2018

Getting quality time with customers (current and potential) is not easy at trade shows. They are busy and so are you. Past columns have mentioned how to collect customer information and develop customer insights, both within and outside the booth, and the importance of analytics to make sense of these bits and pieces. However, there is a unique opportunity at events to potentially get a lot of face time with your customers and to develop valuable customer insights. The opportunity: hosting a customer event and running it as part of your event intelligence program.

This article focuses on two types of customer events:

1. Having a customer event at your facility when the trade show happens to be in the same city as your organization;
2. Hosting a customer reception somewhere near the trade show venue when the trade show is not in the same city as your organization.

Hosting multiple customers together at your own corporate event outside the trade show facility (and away from prying eyes) provides a unique opportunity to find out what's on your customers' minds. It's a great way to further your win/loss analysis, identifying not just what your customers' current and future needs are but also why they have these needs. The event can even be used to develop competitor insights. Caution (or a big warning): whoever you invite to your company event is going to be busy at the trade show and has probably put their own meeting schedule together well before the event. If your company is going to do one of these intelligence-rich events, be sure that the invitation gives them a compelling and valuable reason for attending. Also, commit to doing this long enough before the trade show so that the customers you want at the company event are not already booked up.

This article was written predominantly from the perspective of hosting an event at your company facility – the real home field advantage. I will, however, point out where the advice changes if it's an out-of-town trade show. Although, in the case of an in-town trade show, the location for your company event should be your own facility, for an out-of-town trade show, your company-hosted customer reception should be in one of the event hotel reception rooms or in some other attractive location. Ensure, however, that the location is conducive to company presentations, interviews, and networking. Your company may want to choose a location based on glitz, which does make sense from a marketing perspective (and they are likely to be footing the bill). But you need a location that is suitable for event intelligence.

I have been at several events taking place in the home city of one of the organizations I was helping. Allow me to outline the flow of steps when a company hosts a customer reception at their facility (the full home field advantage). I will point out where the flow differs in the case of a non-home facility.

A few months before the trade show, the company invites several of its customers (and some potential customers) to the event for a tour and meet-and-greet with the company's personnel (including R&D staff). It's an opportunity to show off to the customers how well the company is doing with upcoming products, and so forth. Management, sales staff, and others also extend invitations to people whom they feel should be invited but were not on the initial invitation list:

1. Customers show up at the company's facility/event location where they have a meet-and-greet with company staff and others.
2. A presentation follows where the company's senior management talk about the company, its products/services and possibly future plans.
3. Customers are (normally) taken on a tour of the facility where they can interact with other members of the organization, which could include seeing prototypes of future products. (This step does not happen with an out-of-town hosted event.)
4. The event ends with a reception (food and drink) at which company staff, customers, and other invited guests mingle.

I hope those reading this will see the enormous CI potential in all four of these mini-events and the extraordinary opportunities for developing customer insights. I also hope that those of you whose companies have hosted these receptions before, without CI involvement, are now realizing that you had better waste no time in planning these events.

Below are five planning tips for your organization when inviting key customers (and sometimes others) to maximize each of these opportunities. It's not a complete event plan guide, but it should give you a great start.

1. Get your organization's event logistics details, including schedule, invitees, and company personnel, to be on hand

CI rarely gets to influence how the event is run – typically it is marketing/sales that does this. However, if you are sufficiently well respected by marketing/sales and have a well-thought-out plan, you may be able to influence who is invited (beyond the current customers) and also influence the schedule.

The schedule of events mentioned earlier is important as it lays out the different opportunities to gather information and the kind of information that can likely be gathered. For example, during a product development tour, you will probably hear the customers talk about their future needs/requirements. At a recent event, one commented (upon seeing the product development): "That will certainly help us with our Northern Europe expansion." You might even get technical questions depending on who is invited. By having the "guest" list, you will know who will be there and, through proper profiling, what information they might have which could help your intelligence efforts as well as how best to approach them for this information.

If the event is not at one of your facilities (the out-of-town corporate event), think about how you can in a sense simulate a bit of a tour remotely, and demonstrate new and emerging products. Getting customers to touch/feel/play with these products creates a great environment for developing customer insights.

2. **Look at your current customer insight needs (and maybe beyond them) to identify how the corporate event can help your insight program**

Look at the event in two ways. First, go over your current intelligence plans and ask who on the invitation list has what you need for your different information needs. Second, look over the guest list again (in step #1) and ask who on this list could also be a helper (more on that in step #3). Be clear about what you want to know and who is most likely to have that information.

3. **Identify individuals within and outside the organization who can be assigned roles at the corporate event**

You were given the guest list in step #1 and hopefully you also got the list of who was attending from your organization (you don't normally see them on the guest invitation list). There are many different roles in event intelligence. You will want people who can pose questions to your customers during the walk around and at the receptions. You need people who will write down the questions that customers ask during the tours and presentations (this reveals a lot about their needs/concerns), people to write down customers' answers to the questions posed by your collectors, and finally, people to watch customers' body language. For example, which parts of the presentation did they get most excited about (or bored them the most)? Which new products were customers most interested in? For example, if you invite a customer's technical senior management to the event, you may want your organization's technical staff talking to them (they speak the same language). I call these people subject matter experts.

Unlike a trade show, which has a high cost associated with sending extra people to it, there's not much additional cost associated with inviting a few extra company employees to an at-home event. As for the externals who were invited (those from outside your organization), do you have any (what I refer to as) friendlies – people who can ask questions and watch on your behalf? At one company trade show event, government and association people were invited. Both groups of people were very effective at asking questions. Customers whom you are particularly close to may also be asked to keep their eyes open and to ask questions at the corporate reception.

4. **Identify if additional individuals should be invited (either from inside or outside the organization)**

Armed with knowledge of what you want to collect at the company event (step #2) and who you have to help you (steps #1 and #3), you may need more help, such as additional subject matter experts or just additional helpers. Either way, home field does have its advantages because there is no real cost (except for food) in getting more of the company employees at the event. Step #4 may also involve asking management to invite additional customers, suppliers, or others to the event if you feel that they could help either with information needs, or if they could be valuable helpers (steps #2 and #3).

Of course, if the event is out of town, planning early enough might give you the lead time to have additional company personnel there or give you time to approach friendlies who will be at the show and who you feel comfortable asking to help you.

5. Establish a logistics plan

You now know what information you want from those in the room so that you can develop customer insights, and you know who you have to work with in collecting the information. Now it's time to assign information collection roles and establish a logistics plan.

Logistics can include things such as who collects what and at what part of the company event (mingling, company presentation, plant tour, and reception), and even where you want people to sit. At one company event where I was one of the targets for information, I always seemed to have someone from the organization sitting next to me asking questions. It was very effective and prevented me from spending too much time gabbing with my friends (they did allow some time for that!!!!). Logistics also includes setting up meeting times for those helping you at the corporate event – real-time debriefing with the intelligence team during the event. For example, I suggested that the people conducting interviews at one company event meet up three times during the event. The time would be spent quickly reviewing how well the collection was going, identifying any problems that were occurring, and determining if any person or topic needed additional support.

Given that an event only lasts a few hours, having these short meetings are critical to ensure that the activity remains on track. For example, at one event that I was co-coordinating, we decided to change who was interviewing certain key targets – we swapped assignments.

SUMMARY

Trade shows, conferences, and other events that bring together customers are great venues for developing valuable customer insights. Hosting an event either at your own facility (if the trade show is in your company's home town) or hosting an event for customers in the event city (if it is out of town) provides a great opportunity to develop customer insights and for other elements in your insight program, but only if you plan properly for it. Hopefully, this article, which was based on several company trade show receptions that I have been a part of, provides lots of ideas on how to maximize the benefits of these kinds of events.

I hope you will not be like one of the companies that I was trying to help develop intelligence capabilities (not trade show intelligence specifically) who told me after the event how they had had a large number of customers attend an event at their main facility during a local trade show. They proudly told me about how many customers had attended and how impressed the customers had been with their products and the facility. When I asked whether they wrote down and analyzed their comments and questions to identify patterns, whether they tied the event in with their intelligence plan (they had a great set of intelligence plans – I thought), who watched the body language, and other such event intelligence questions, they went very quiet. Don't waste this valuable intelligence opportunity!

Conference and Trade Show Intelligence Goes International

Competitive Intelligence Magazine, May/June 2008

I've attended conferences and trade shows all over the world. After logging some 250,000 miles last year, I am closing in on membership of the century club, a club for people who have traveled to 100 or more countries. And I can attest to the wisdom of the following quote from the website, Trade Show Advisor:

> ***"What works in one country doesn't play the same way in another."***

Whether you are from Asia going to a North American show, from North America going to a European show, from the Middle East going to a Latin American show, or any place in between, you may have to rethink your competitive intelligence plans.

ROLE AND PURPOSE OF TRADE SHOWS

According to Trade Show Central (one of the largest databases of global events), of some 15,000 events scattered around the world, 5,525 are in the United States. So, roughly two-thirds of the events listed are outside the United States. Similarly, eventseye (another database of trade show and conference information) identifies 4,667 shows in Europe, 1,470 in Asia Pacific, 681 in Africa/Middle East, and 440 in the United States. Whichever source you use, trade shows and conferences are big business around the world.

However, trade shows serve different purposes in different parts of the world. Perhaps the best explanation in terms of their purpose comes from an article by Sandy Flom on the Extraordinary Show Productions website:

> ***"US trade shows are viewed as a place to gather a lot of information very quickly and visitors do not typically spend much time at any particular exhibit. Outside the US it is quite the opposite. Trade shows attract higher level attendees and serve as a venue for holding high-level meetings and negotiating major contracts. Visitors spend significant amounts of time in the stands, which creates the need for private meeting and hospitality areas."***

What this means from a competitive intelligence perspective is that customer-related intelligence topics can be more important in non-US environments. Furthermore, with higher-level individuals in attendance at shows and conferences outside the United States, you may have to rethink your collection plans — not only your key intelligence topics (KITs), but also who you bring along to help in the collection efforts. For example, when an event attracts high-level delegates, can you engage some of your senior executives to help the collection process?

Finally, as mentioned in the Flom quote, attendees spend more time in the stands in non-US environments, so you must allocate the appropriate amount of time for the collection of information at booths. Also think about the physical layout, since these events typically have many private meeting areas. How will this affect the availability of your target? Where will they be?

LOGISTICS ISSUES: SPACE AND TIME

From a logistics perspective, trade shows in Asia and Europe typically run longer (over more days) and are open for longer hours than North American events. Also, the show's physical size can be much larger. I have been to events in Germany and Japan, for example that have spanned more than five large exhibition facilities. From a planning perspective, this larger size presents both good news and bad. With more days and hours, you have the potential to collect more information. But because of the large physical space, you may have to plan your collection routes very carefully.

For example, one organization identified in its plan which exhibit halls at a major event contained the information needed for each KIT. The organization then planned out its collection schedule by matching a specific day with a specific hall. It involved 55 kilometers of walking between the top of the first hall and the bottom of the last. Of course, thousands of regional shows are far smaller than the corresponding shows in the United States.

One final, potentially frustrating logistics problem is linked to another situation I have seen in several shows outside North America. "Many trade fairs are open to the public for a day or more — usually at the end. The public can include children and students with teachers — and they often come in droves" (Flom). Without very careful planning, you could find yourself in a mass of public people, not quite the targets you had in mind. An example is the last day of the Foodex trade show in Japan. There was such a crush of people, I could barely move. Interviewing at booths is next to impossible on these days, so plan your collection with the foreknowledge of which day the booths will be overrun by the public. On the other hand, if your collection technique involves observation, blending in to observe will be far easier on the public day.

CLIMATE, CULTURE, AND LANGUAGE

Arjan Singh, Jodie Peake and Leonard Fuld (2007) provide the following great advice regarding climate, culture, and language:

> ***"In hotter climates, the highest attendance numbers are likely to be at the morning sessions. Many sources you are planning to contact will take an afternoon off to "see some sights" or just to bask in the sun. Also, typically there are more and better attended social events in hotter regions of the world as opposed to those conferences in cold, rainy cities.***
>
> ***Good weather and hotter temperatures also greatly increase your chances of gathering intelligence outside the walls of the conference, at social events and outdoor areas of hotels such as bars, pool areas, and city tours. We all know that a bit of sunshine makes people happy and happy people are more willing to talk, especially to other seemingly (and genuinely) happy people.***

***Recognize that cultural and language barriers exist and be prepared to overcome them. Use a source's language skills — or lack thereof — as a barrier to questions regarding your intentions.* (See Table 1 for a summary of typical differences between US, European, and Asian conferences.)**

If you are finding it tricky to get answers to those really probing KIQs (key intelligence questions) without a source becoming guarded, use longer words, and speak slightly faster. Your source will focus more on your words and be less concerned with your original question. Equally, at European congresses, English may not be the mother tongue of many sources. As an English speaker yourself, you can immediately establish rapport with others who count English as their first language."

Table 1: Typical differences between US, European and Asian conferences

	United States	**Europe**	**Asia**
Company stands	Relaxed	Semi-formal	Formal
Introductions	Not necessary	Mandatory	Mandatory
Setting up meetings prior to the event	Not critical	Recommended	Highly recommended
Photo policy	Strict/semi-strict	Relaxed	Mixed
Language barrier	Non-existent	Likely	Likely
Dress code	Relaxed	Semi-ormal	Formal

Source: Singh, Peake and Fuld (2007)

The preceding advice is bang on from the shows that I have attended. Here's some additional advice regarding the cultural dimension — one of the most important variables to consider when conducting intelligence at international trade shows. But to add a little more "academic" weight to my advice, consider profiling the culture to understand how best to approach your targets. Geert Hofstede, one of the pioneers in this area, has proposed a model that looks at culture from five perspectives (see Box 2), each of which has an impact on the type of interviewing technique you use.

For example, suppose that your KIT involves getting information on a target's strategy and future developments. Countries that have high power distance make for very difficult interviewing at trade shows, unless you are dealing with top-level officials. In such situations, power and information rest in the hands of the senior executive. Lower-level employees do not possess this kind of information and are reluctant to talk about what information they have. Thus, how you interview and who you interview are impacted by power distance.

Long-term orientation can also influence the success of your interviews and certainly the perspective of the person you talk to. If you conduct long-range intelligence (technology foresight, for example) and you are in short-term orientation cultures, it is very difficult to focus the target on long-term-oriented discussions. However, cultures high in uncertainty avoidance can provide a unique opportunity for competitive intelligence. Organizations from cultures that avoid uncertainty are likely to have conducted a lot of environmental scanning and competitive intelligence to understand what is happening in their environment. I will talk about Hofstede's model of foreign cultural profiling techniques and its role in competitive intelligence in another CIM article, but you can now appreciate the impact that cultural dimensions can have on the success of your collection efforts.

Box 1: Websites for more information

www.geert-hofstede.com

Hofstede website. This site gives you more information on the Hofstede model as well as laying out the culture profile of many different countries.

www.tsnn.com

Trade Show Central. One of the most comprehensive databases of trade shows and conferences in the world. Lots of search flexibility.

www.trade-show-advisor.com/tradeshow-exhibit-booth.html

Trade Show Advisor. A good site for general trade show advice.

CULTURAL BUSINESS NUANCES

Several books are filled with fascinating information on the nuances of culture and its impact on business transactions (see Ricks, 2006; or Axtell, 1993, 1998). For example, how do you interview in cultures in which the word "no" is either considered offensive or is non-existent? Going back to the Japanese food show example, if you asked potential customers if they liked the sample of food that you placed before them, they simply would have said "yes" to be polite. But observing if they threw out — or threw up — the sample would certainly be better.

I have many examples of how I had to reword questions because of how the culture would react to them. Other cultural elements to consider include time orientation (how important is it to be on time?), extent of formality, and so forth.

Culture permeates a trade show in many ways. First, remember that you are not operating in your home country, so understanding the local cultural mores is an important component of successfully executing your trade show competitive intelligence plan. Second, trade shows bring together people from many countries, so the person you are interviewing may come from a country different than the host country.

For example, before attending a German trade show, you profile the German culture and learn about the difficulties of interviewing and how to overcome them. But you may end up collecting your information from a Brazilian competitor who has a booth at the German show. For them, the Brazilian collection rules apply. Be sure to understand the cultural ramifications of all your targets' countries.

INTERVIEW SCRIPTS AND LOCAL EXPERTS

Given how culture and language impact the success of your international trade show competitive intelligence plan, it is best to have a local expert check your plans before the event. The local expert should check whether you are asking the right questions and in the right way. Consider bringing in a local competitive intelligence expert to help with your collection efforts.

I followed this approach in Japan. My ability to elicit information from Japanese targets at the trade show would be hampered both by language difficulties and, well, by not being old enough (there is a lot of respect given to older people in Japan and the targets were senior Japanese executives). I could certainly meet with these targets as they were polite enough to grant me interviews, but the probability of directly obtaining the information I needed was low. Instead, a local expert – an older, seasoned industry competitive intelligence person – had no trouble acquiring the information. Respect for older executives is a core value within Japanese society, so the targets would show my interviewer appropriate respect and be forthright during the interview process. No such need arose with a younger, English-speaking professor from Canada.

There are other key reasons to consider bringing local experts into your collection team. At foreign shows, targets are much friendlier and relaxed when speaking in their native language. (Aren't we all?) Furthermore, when forced to translate from their native language, targets can leave out valuable information. Either they can't find the words for the information or, worse, they try to translate key concepts and end up translating them incorrectly (this happened on a technology-related project.)

It is also true that when someone is translating from their native language, they tend to talk in simpler terms. If the culture has a value of being helpful to strangers (as I have found in the Middle East), then perhaps they will give you more information in an effort to help you. Bottom line, how you ask the question (your interviewing technique), what words you use, and even who asks the questions to whom can be affected by local culture — so, it's best to have a local expert at least review your collection plan.

CONCLUSION

This article began with the quote, "What works in one country doesn't play the same way in another". In this article, I've outlined how the size of the show, the local climate, the length of the show, and differences in the language, culture, purpose, and importance of the show can significantly impact your conference and trade show efforts. Success outside your country's borders is based on understanding these differences and reflecting them in your conference and trade show competitive intelligence plans.

Box 2: Hofstede's cultural dimensions

Power Distance Index (PDI) is the extent to which the less powerful members of organizations and institutions (like the family) accept and expect that power is distributed unequally. This inequality (more power versus less power) is defined from below, not from above. It suggests that a society's level of inequality is endorsed by the followers as much as by the leaders. Power inequality, of course, is a fundamental fact of any society, and anybody with some international experience will be aware that all societies are unequal, but some are more unequal than others.

Individualism (IDV), on the one side, versus its opposite, collectivism, is the degree to which individuals are integrated into groups. On the individualist side, we find societies in which the ties between individuals are loose: everyone is expected to look after himself and his immediate family. On the collectivist side, we find societies in which people from birth onward are integrated into strong, cohesive groups, often extended families (uncles, aunts, and grandparents) that continue protecting them in exchange for unquestioning loyalty. The word "collectivism" in this sense has no political meaning; it refers to the group, not to the state. Again, the issue addressed by this dimension is an extremely fundamental one, common in all societies in the world.

Masculinity (MAS) versus its opposite, femininity, refers to the distribution of roles between the genders, which is another fundamental issue for any society. The IBM studies revealed that (i) women's values differ less than men's from one society to another; and (ii) men's values from one country to another vary from very assertive and competitive and maximally different from women's values, on the one side, to modest and caring and similar to women's values, on the other. The assertive pole has been called "masculine" and the modest, caring pole "feminine". The women in feminine countries have the same modest, caring values as the men; in masculine countries, the women are somewhat assertive and competitive, but not as much as the men, so masculine countries have a greater gap between men's values and women's values.

Uncertainty Avoidance Index (UAI) deals with society's tolerance for uncertainty and ambiguity; it ultimately refers to humans' search for truth. The UAI indicates to what extent a culture programs its members to feel either uncomfortable or comfortable in unstructured situations. Unstructured situations are novel, unknown, surprising, different from usual. Uncertainty-avoiding cultures try to minimize the possibility of such situations by strict laws and rules, safety and security measures, and on the philosophical and religious level by a belief in absolute truth: "There can only be one truth and we have it." People in uncertainty-avoiding countries are also more emotional and motivated by inner nervous energy. The opposite type, uncertainty-accepting cultures, are more tolerant of opinions different from what they are used to; they try to have as few rules as possible, and on the philosophical and religious level they are relativist and allow many currents to flow side by side. People within these cultures are more phlegmatic and contemplative, and not expected by their environment to express emotions.

Long-Term Orientation (LTO), versus short-term orientation (STO), is the fifth dimension, and it was found in a study among students in 23 countries around the world, using a questionnaire designed by Chinese scholars. It can be said to deal with virtue regardless of truth. Values associated with LTO are thrift and perseverance; values associated with STO are respect for tradition, fulfilling social obligations, and protecting "face". Both the positively and negatively rated values of this dimension are found in the teachings of Confucius, the most influential Chinese philosopher, who lived around 500 BC; but the dimension also applies to countries without a Confucian heritage.

(From http://www.geert-hofstede.com/)

I have derived immense enjoyment from learning about and experiencing these differences. Grab me at a conference and I can tell you more interesting culture stories. So in parting, I offer these words of advice for your future international trade show efforts: be prepared, soyez prepare, seien vorbereitet Sie, sia preparato, 準備されなさい, 准, подготовьте. (Translation based on my experience and babelfish — so apologies for the mistakes, especially if I've inadvertently insulted your parents.)

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Section 5:
Getting Ready for Your Event Intelligence Future

Dear “C” – Please Give Me the Resources for a Trade Show Intelligence Program

Competitive Intelligence Magazine, January/February 2008

Call this month’s column a response to readers’ more frequent requests. Thanks to the column and the trade show intelligence book that I edited with the Competitive Intelligence Foundation, I have a certain (shall we say) notoriety within the trade show intelligence arena. As a result, I frequently receive emails asking that I address certain topics. Today’s column is in response to one of the more frequently asked questions:

> ***“How do I get senior management to buy into a trade show intelligence initiative?”***

I recently gave a talk about trade show intelligence to a group of senior executives. Most were at the “C” level. It was a very daunting task for the following reasons:

- Generally, these senior executives took a dim view of trade shows. In fact, most executives at this meeting stated that the results they obtained from these events were disappointing. But then they expected disappointing performance.
- Several of the “Cs” asked, “Why should I care about trade shows? That’s for my marketing and salespeople.” They authorize the budget, but it is not one of their concerns.

So, the next time I gave my talk to senior executives I revised the presentation to emphasize the fact that you will not get “C” level interest in trade shows, and of course trade show intelligence, unless you make it relevant to them.

The rest of this column is in essence a partial transcript of my revised talk. You can use portions of it to create a letter that you can either send to your “C” level officers or to engage them in the trade show intelligence process. The first objective of this column is to get the “C” level officer committed to the idea of intelligence. The second is to demonstrate how important trade shows are in this process. Then follow up by making a request for resources. (By the way, it may be easier for you to take the opposite approach, which is to sell them on the information potential from trade shows and then work on convincing them intelligence is great. The ordering is not as relevant as the core arguments.)

1. THE IMPORTANCE OF INTELLIGENCE, FORESIGHT, PERIPHERAL VISION

Part of the problem with “selling intelligence” is the term itself. It does have some very negative connotations. More books are arriving in the market appearing to talk about intelligence, but under different names. For example, Day and Shoemaker’s book, *Peripheral Vision* (2006), is receiving a lot of attention from senior managers. When describing the need for peripheral vision, the authors often quote from intelligence materials. In fact, their definition of peripheral vision is very close to our intelligence definition.

Bill Gates, in his book, *Business at the Speed of Thought* (1993, p. 3), writes:

"The most meaningful way to put distance between you and the crowd is to do an outstanding job with information.... How you gather, manage and use information will determine whether you win or lose."

He discusses the need to make sense of the data through analytical techniques. This is our classic intelligence definition, but he calls it knowledge management. Davenport and Harris, in *Competing on Analytics* (p. 7), describe it as:

"the extensive use of data, statistical and quantitative analysis, explanatory and predictive models, and fact-based management to drive decisions and actions."

Selling the Intelligence Process

All of these description sound like intelligence; different companies and different executives simply use different terms. The key is that you are really selling the intelligence process, regardless of what you call it. Intelligence helps your company sustain and develop distinct competitive advantages by using the entire organization and its networks to develop actionable insights about the environment (customers, competitors, regulators, technology, etc.). It uses a systematic and ethical process involving planning, collection, analysis, communication and management.

Why is this capability so important? The Global Intelligence Alliance sums it up well on their home page (www.globalintelligence.com):

"Today's business environment demands a comprehensive system for managing risks in the external business environment. Never before have the forces of globalization been as intense as they presently are. Most business executives feel that these forces of change will have a major impact on their organizations."

Selling Surprise Avoidance

Most companies admit they do not do a good job of dealing with their environment (regardless of what they call the process).

One survey of global senior managers found that 81 percent perceived a future need for their peripheral vision to be greater than their current capacity. Most organizations felt that they lacked sufficient capacity to detect, interpret, and act on what was termed "the critically important but weak and ambiguous signals of fresh threats or new opportunities that emerge on the periphery of their usual business environment." (Day and Shoemaker 2006, p. 5).

Fully two-thirds had been surprised by as many as three high-impact competitive events in the past five years. In addition, 97 percent of the respondents said their companies lacked an early warning system (Gilad 2006). To address these "surprises", most of the world's largest companies have set up integrated intelligence capability (GIA 2005, 2007). In the book "Competing through analytics", the authors list many of the world's biggest companies and their analytical focus.

Proven Value

So, now I have the executives' attention. It's time to tell them that members of SCIP have received enormous value from their intelligence efforts. According to the 2006 Foundation study (Fehringer, Hohhof and Johnson 2006), intelligence systems lead to:

- New or increased revenue
- New products or services
- Cost savings/avoidance
- Time savings
- Profit increases
- Financial goals met

These systems were focused on various intelligence topics (in rank order):

- Company profiles
- Competitive benchmarking
- Early warning alerts
- Market or industry trends
- Customer or supplier profile
- Technology assessment
- Economic/political analysis
- Executive profiles

In turn, the intelligence gathered from these key intelligence topics (KITs) resulted in supporting decisions in the following areas:

- Corporate or business strategy
- Sales or business development
- Market entry decisions
- Product development
- R&D/Technology
- M&A, due diligence, JVs
- Regulatory/legal

Surely, your "C" level officer will see something here that they are interested in. There may even be a threat situation by virtue of the fact that their competitors are doing this.

2. NOW FOR THE TRADE SHOW PITCH

So, now that you've established the belief that intelligence (or whatever you want to call it) is important, how do trade shows fit in? Interestingly enough, I helped set up a trade show intelligence mission recently for a multi-billiondollar company. Their senior vice president bought into intelligence, but thought that going to a show was a sure waste of time: "If a competitor asked me for information, I would lie to them." Well, I made sure that this executive accompanied members of his team to the trade show. His reaction after the show was: "I can't believe how much information you can get from these events."

Here are some quotes to help sell management on the value of trade shows:

> ***"Conferences furnish the greatest potential for collecting intelligence in the shortest span of time, for the least amount of money... Many formal and informal activities take place at conferences that can furnish a plethora of collection opportunities… Too few people approach these situations as collection opportunities, especially in a systematic, pro-active way."*** **(Shaker and Kardulius 1996)**

> ***"Properly organized, a competent, well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances."*** **(Prior 1996)**

> ***"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 have attended many shows on behalf of companies. Here is just a partial list of what the trade show teams have accomplished for their companies:

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

Information Content and Validation

What makes these events so good? From a collection perspective, most people attend a conference or a trade show to exchange information. Information collection itself is easier as many people are in one place and have gone there to talk.

Validation of information is also simpler at conferences and trade shows. Alternate sources are always available to validate information at the event – everyone is there. At one show, my task was to confirm a rumor about a major technology development occurring within the next year. The show's attendees included scientists who certainly would be involved in this activity, government officers tracking this technology, companies creating leading-edge technology, academics, and others who would have been consulted on or known about these emerging developments. Verifying the rumor was straightforward and quick.

Trade shows also include many of your organization's employees, customers, suppliers and others from your network who, if asked the right way, could help you collect information at the event. Not only do these events bring with them much information, they also provide you with many individuals who could help you collect it.

Support KITs

The preceding discussion focused on collection and validation. A conference or trade show event can also provide you with the opportunity to collect information to support your organization's ongoing key intelligence topics (KITs). For example, you can use shows to update customer or competitor profiles. Exhibiting companies have product information at their booths, and in addition you can ask booth staff a few questions that can help update these profiles.

But you can do more than collect for existing KITs. Several successful organizations running the entire intelligence process at an event can develop actionable recommendations there – the entire intelligence process can be addressed at the show.

3. THE FINAL PITCH

Before going to the final pitch, you need to be sure that you have convinced your "C" level officer that the intelligence they need could be at the show. It would help if you had highlights of the program to show them, a list of booths, presentations, etc. Provide something that can identify the potential for information gathering.

Now for the final pitch – I call this the "power of 3s" argument. I ask the "C" level executive the following questions:

- How many days is the average show? Average answer: 3 days.
- How many questions can you ask a target at a booth before they get suspicious and ask you to leave? Average answer: 3 questions.
- How many people staff the average booth? Average answer: 3 people.
- How many times can I go back due to shift changes or the people simply not remembering me? Average answer: 3 times.

Now, put the answers together – a trade show provides the opportunity for one person to ask a single target company 3 x 3 x 3 x 3 questions or 81 questions. By watching the Japanese, French and other companies at the shows, I learned the power of multiples. If you can have 10 of your own company employees who are at the show assisting with your information collection, the number of questions can be increased to 810.

If you convince a few of your friends (customers, association personnel, government officers, and others) to assist, the number of questions runs into the thousands (and I have seen it done), and this is for only one target company. Add up all the other targets, the workshops, parties, and other collection opportunities and you can see how the amount of information you acquire quickly adds up.

However, the only way to take advantage of this opportunity is to be organized. Obviously, the more people involved in the process, the more information you will collect. This intelligence gathering requires careful ongoing planning, assessment, communication, and management. In addition to personnel time to conduct these activities at the event, you will need pre-event planning and training of your collectors, and post-event debriefing and analysis. Box 1 shows a sample schedule from one day of a trade show intelligence program. (More forms and schedules are available in the Competitive Intelligence Foundation's book, *Conference and Trade Show Intelligence*. It also includes detailed advice on conducting trade show intelligence, including many interview tips.)

Box 1: Sample schedule from one day of a trade show intelligence program

09:00 – 10:00	Walk about to ID plan reasonableness
10:00 – 11:00	Development of new collection forms, plans, modification
11:00 – 11:30	Meeting with core team – new plans
11:00 – 17:00	Collection: show, sessions, meetings
17:00 – 19:00	Collation of day's collection
19:00 – 21:00	Analyst meeting
21:00 – 22:00	Report preparation, prepare next day's plan
22:00 – 23:00	Report distribution (includes HQ)

TO RECAP

Here's your three-step plan:

1. Intelligence is important: they need it and others are doing it.
2. Trade shows are a target-rich environment for information.
3. Properly organized, you can get a lot of information and develop valuable intelligence at events.

One last thing: if the "C" argues that the company is too small to implement event intelligence, please let them know that Dr Calof has seen companies with under 10 employees accomplish amazing results at shows through this process. In fact, small and medium-sized firms are my bread and butter in Canada.

Good luck with the pitch. Let me know if it works, but also feel free to email me your ideas on how to sell a trade show intelligence program. I will share these with my readers in future columns.

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Conference and Trade Show Intelligence: Jump Start Your New Function

(Starting a Competitive Intelligence Function Book, available from SCIP)

Want a quick way to jumpstart your competitive intelligence function? Looking for a way to build commitment to intelligence and a culture of information sharing? Then think about starting your intelligence efforts with conference and trade show intelligence. This approach, which has been applied by several companies across many industries, has proven to be successful in gaining management commitment to intelligence.

This chapter provides a straightforward approach for building intelligence capability via conferences and trade shows. Done correctly, it's a great way to start your company on its way to developing a competitive intelligence (CI) unit.

THE IMPORTANCE OF TRADE SHOWS

Past research has shown that trade shows account for over 22 to 25 percent of the typical US business market promotional budget (second only to personal selling), accounting for nearly one-fifth of the total budget of US firms and European firms (Jacobson 1990; Herbig, Palumbo and O'Hara 1996). One past study puts total expenditures at $53 billion annually (Herbig, Palumbo and O'Hara 1996). According to a business marketing association study conducted in the late 1990s, 93 percent of their members attended trade shows, with 53 percent attending between three and six trade shows per year (Meltzer 1996 p. 31).

Clearly, trade shows are big business for most companies. While recognizing the need to have their company at these events, senior managers nevertheless have been rather disappointed with the value their company obtained from attending them. So, you have a significant opportunity to show the value of your CI function, especially when your company spends a considerable amount of money on these events.

Two of the major sources accounting for this disappointment are:

1. Not setting appropriate objectives at the show.
2. Not having an appropriate plan to realize these objectives.

Trade shows provide a very interesting opportunity to introduce intelligence into your organization (and one that has proven to be very successful) – that is, start off by helping management solve their existing trade show problems by applying the intelligence process to them.

Trade shows are also an excellent way to start building a culture of information sharing. By the time your intelligence function completes its first trade show program, you will have directly worked with all your company's participants at the event and also with senior management to define their intelligence topics.

OFFER MANAGEMENT A SOLUTION

Show your management how intelligence can help solve an existing trade show problem or simply inform them about the intelligence opportunities that trade shows present. The first step is to demonstrate to your management how valuable trade shows are in general and how valuable trade show intelligence, specifically, can be to the organization.

While executives should already know that trade shows have significant information potential, the Competitive Intelligence Foundation book, Conference and Trade Show Intelligence (Calof, 2007), and the SCIP annual conference proceedings provide several examples of the immense value of a legally and ethically appropriate event intelligence program. These sources show how conference and trade show attendance can be leveraged to:

- Learn about customer needs, emerging technologies, government directions, and competitor plans;
- Compete in specific markets;
- Find sales opportunities and joint venture partners.

The goal of this education is to convince your senior managers to make intelligence a part of their event attendance goals, and to send you to a trade show as part of the company's show personnel. Keep the budget low or you will likely not get the necessary support from management.

If management is still hesitant, here is an additional reason to convince them of the intelligence value of events. From a collection perspective, most people attend a conference or a trade show with the objective of exchanging information. These individuals possess significant knowledge about your industry and your competitors. When you properly organize your conference or trade show effort, you can collect more information in three days at the event than you could in a full year using other sources, and at a significantly lower cost.

Trade show attendees include many of your organization's employees, customers, suppliers, and industry experts. Because building your human information networks is a key element of starting a CI function, trade shows provide you with quick, concentrated opportunities to establish and build your networks. In addition, if approached and asked the right way, these individuals could also help you collect information at this event. So, not only do these events provide concentrated access to a great deal of unique information, they also give you many individuals to help you collect it.

DEVELOP THE TRADE SHOW PLAN

A key component of developing the trade show plan is learning more about the intelligence needs of your senior management, which is also an important step in starting an intelligence function. Building on the requirements and definitions you already created during your initial stages, identify the senior executive intelligence needs that could be fulfilled at the chosen event.

As you start developing your event plans, keep in mind that you must also manage expectations. Clearly define and undertake a trade show intelligence project that can be accomplished at the event. Furthermore, the topics you commit to work on at the show establish in your management's mind exactly what intelligence is, so aim to include topics that fall into different intelligence domains. For example, while developing competitor intelligence is important, try to include a topic in the customer intelligence domain and perhaps in the technology domain as well. Also consider incorporating key intelligence topics relating to profiling, early warning, and strategic decision-making. The process of helping management identify their information objectives for an event is itself a value-added activity for your organization.

Only 56 percent of firms participating in trade shows have specific objectives before they arrive. Only 46 percent of companies set goals before they exhibit, and of these half are wishy-washy and one in three exhibitors does not set quantifiable objectives (Herbig 1996).

WORK WITH OTHERS TO DEVELOP THE CULTURE AND SKILLS

Once you have formulated your trade show plan, it's time to start talking with the other people in your company who are also attending the trade show. Many companies schedule a meeting to bring together all the personnel attending an event and discuss the logistics of both the show and booth management. Get onto that agenda. The best way is to offer a short course on improving their interviewing at trade shows. Most people are very uncomfortable talking to people at events, so a short review of effective interviewing techniques should prove to be very popular.

This educational approach also shows how you can add value to your company's general intelligence program – call it building relationships and contacts. Having time to talk to the trade show attendees provides you with an opportunity to review the information that is important to your management and where the attendees are likely to find it at the show.

While it is valuable to inform the team about the topics you are planning to collect and why, it is also useful to start them thinking about their own intelligence objectives. This provides another place for you to help them prepare for the show. After you have helped guide the company through their intelligence objectives and information need process, it's time to help them develop a plan to gather that information. Obtain a copy of the event program and list of exhibitors; then sit down with the trade show personnel and work with them to identify where the needed information is likely to be. Involve them in the work on the game plan. An article in SCIP's Competitive Intelligence Magazine provides 20 pointers and a planning form to help organize your objectives and time at the show (Calof 2005). A sample of the form appears in Table 1.

Provide a briefing on trade show intelligence, share sample plans, and send them background articles. Show how easy it can be to organize for effective information gathering, which makes the event even more productive and valuable to the company. In short, use this as an opportunity to teach your company employees how valuable trade shows can be if they organize for them.

Table 1

Resource Planning Form --
Where Will You Spend Your Time?

	For CI purposes	For personal development	For future CI	For Fun
Workshops				
Meeting people				
Walking the floor				
Staffing the booth				
Parties				

It's also an opportunity to start developing a culture of information sharing by letting them know where you will be during the event and offering to acquire information for them. In turn, find out what the others are doing at the event and have them collect for you. For example, give booth personnel a list of your key information sources. Ask them to call you if these individuals show up at the booth so that you can interview them. Or, when they attend an event workshop or presentation, have them ask the presenter a few specific questions.

AT THE SHOW

This is where all your efforts come together. Do it right and make the show a place where you can develop intelligence for your management and where you can reinforce the information sharing and message focus that is key for a successful intelligence effort.

Your primary goal at the show is to develop the intelligence that management has tasked you with, while also ensuring that management's attention is clearly focused on what you achieve at the event and the value that the intelligence effort brings to the company. Often the best way to accomplish both is to hold daily briefings from the show. Have a daily conference call with senior management back at the company where you update them on what intelligence you have acquired (and the implications of it), and initiate discussion on the next steps.

Intelligence planning is fluid and the briefing provides a unique opportunity to show how plans can change (and should change) and how new topics are introduced. This is also a good way for you to demonstrate the importance of the intelligence process.

A second objective is to continue building the intelligence culture of your organization in general and specifically with the people who are attending the event. Your focus is on information sharing and task focusing. Schedule time at the event to work directly with the company employees who are in attendance. Handle this part well and they will become the biggest supporters of your intelligence effort. Handle it incorrectly and they will spread the message far and wide about how foolish your effort was.

Here are a few ideas to make your interactions more effective:

- Offer direct assistance to them.
- Help them focus in on their objectives at the event.
- Ensure that they have opportunities to share the information they've gathered.

Find opportunities where you can collect for them without taking up too much of your time. Also find similar opportunities where they can collect for you and the organization without tying them up too much, time-wise, and distracting them from their primary event responsibilities.

Give yourself the opportunity to brainstorm with others about the implications of the gathered information – this constitutes an excellent way to use the collective knowledge of the group to gain insight. The employees will like it as it allows them to go beyond just data reporting. In a sense, you have moved them into a more advanced phase of the intelligence process without their realizing it.

EVENT DEBRIEF

Now it's time to put the rest of your plan to work. Back at home, communicate the final results on what you have done. Apart from wowing your intelligence consumers with the intelligence and information you uncovered at the event, hold a lunch-and-learn type session where you show others how you approached the trade show. Have other personnel who were at the event talk about their experience and how the process you created helped them.

This extended effort helps educate the entire organization about intelligence and its value. The purpose is to make the organization ready to accept a process that requires careful planning and coordination, collection, assessment and communication. The key to this successful process is focusing on information sharing and helping each other in the intelligence effort.

THE INTELLIGENCE UNIT/RESOURCE COMMITMENT

After your successful initial trade show effort, two subsequent outcomes are likely:

1. You receive a mandate to conduct more trade show intelligence activity.
2. This provides a jump-start to establishing your new CI function.

In either case, the end result is an increase in resources that management are willing to devote to the effort.

If you achieve the first outcome, you can simply go to management and make the case to expand the effort. If they were happy with the results from this one event, then link it to other events that the organization is attending.

Regarding the second outcome, your entry point is generally to show management the CI process performed at the event and how it can be applied to information that becomes available all the time – not just at trade shows. Start with a discussion on how a coordinated trade show intelligence process has helped new CI functions show early results. Here, having an arsenal of intelligence examples from other companies comes in very handy. It should not be a conceptual stretch for management to accept the value of an expanded, ongoing program, especially if they have enjoyed the benefits of what you achieved during the event.

Depending on how you have positioned the new CI function with management, and the level of support you have been able to secure for the function, you may consider not even mentioning the word "intelligence" until you have finished a successful trade show effort. Wait until management is impressed with what you can do at the trade show; then let them know what they actually witnessed was the intelligence process and that it can be applied on a day-to-day basis within the new CI function.

By this point, you should have senior management support for an increased effort, employee buy-in from seeing the process at work, and a clear understanding of the organization's intelligence needs. Not bad for a simple trade show project.

IN SUMMARY

The trade show approach seeks to take advantage of an existing management concern by taking the opportunity to showcase the intelligence process. Rather than trying to fight an uphill battle of convincing management to buy into a process they don't think they need, focus instead on using the process to solve an existing problem.

The resource commitment for a trade show effort is low enough for opposition to be minimal. The valuable intelligence resulting from a well-run conference or trade show event program can convince most managers of the value of the intelligence process. At least, that has been my experience.

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Highlighting and Growing Your Organization's Intelligence Program: Event Intelligence New Year's Resolutions

Competitive Intelligence Magazine, Spring 2017

Thanks to predicted increases in overall trade show activity this year and next (Exhibitor Online 2016), 2017 could be a great year for your overall intelligence initiatives.

The broadening of corporate reasons for going to trade shows and even the dramatic changes taking place in "the way people visit and experience trade shows" (Barker 2016) all require new kinds of intelligence. Couple this with an increase this year in trade show intelligence SCIP educational programming, and, if done correctly, you may be able to gain more prominence in your organization for your competitive intelligence function. The bottom line is that the need for intelligence, for and from your company's trade show efforts, has never been greater, even if your company's senior decision-makers are not aware of it.

To help you take advantage of the intelligence-rich opportunity, this article will set out three intelligence resolutions for your New Year:

- **Resolution #1:**

  I will strengthen my event intelligence skills and knowledge.

- **Resolution #2:**

  I will convince senior management of the importance of trade show intelligence.

- **Resolution #3:**

  I will look for ways to help my company's trade show team, whether I am going to the event or not.

This article also provides ideas on how to successfully accomplish these three resolutions. Highlighting trade show intelligence New Year's resolutions seems appropriate for the first 2017 issue of Competitive Intelligence which comes just before the SCIP annual conference in Atlanta.

I hope that the article gives you the kind of information and insights that will help make 2017 a year of CI growth for you and your organization, and will help you build a more active and successful event intelligence program.

RESOLUTION #1:

I will strengthen my event intelligence skills and knowledge

This is a year for learning how to do event intelligence even better. Most companies are concerned with the return on investment from participating in trade shows. In this regard, a properly developed and executed event intelligence plan has been linked to innovation and intelligence effectiveness (more on this later). At the core of the process of maximizing the ROI potential of events is the development and implementation of an integrated trade show intelligence plan, which ties in the organization's decision-making needs and intelligence needs with the opportunity to develop this intelligence at the trade show. To make this happen requires knowledge of how to develop event intelligence plans and how to run intelligence plans at events, and the necessary skills for interviewing at events. Recognizing both the growth and importance of trade show intelligence and the need to ensure that SCIP members develop the knowledge and skills needed for successful event intelligence, 2017 is seeing several SCIP event intelligence CI programs.

First off, there is going to be a workshop on event intelligence on Tuesday May 16th at SCIP's 32nd annual conference in Atlanta, Georgia. At the workshop, participants will see or hear event intelligence templates and plans, tips on how to interview at events, advice on protecting information at events, strategies for getting others to help you at events (especially important if you are a one-person intelligence team), and some ideas on how to use events to develop an information network that you can use after the show.

Tentatively scheduled for June 2017, SCIP will be running a Trade Show CI webinar. This is a follow up to the SCIP "Trade Show CI" webinar given on January 10th by Erik Glitman, CEO of Fletcher/CSI. That webinar was filled with many valuable tips on how to identify appropriate trade shows, key elements of a trade show CI plan, engaging with other company team members to help at the event, translating the trade show CI findings into action, and more.

For those who prefer their information in written, rather than webinar, format, get a copy of *Conference and Trade Show Intelligence*, a book available on the SCIP online store. This book contains examples of trade show plans and templates, and lots of advice on cases and best practices from leading competitive intelligence practitioners. There are also a lot of articles, in past issues of *Competitive Intelligence Magazine*, on how to design and run effective event intelligence programs. Read the October 2014 article, "Want a Good Return for your CI dollar? Consider Event Intelligence: A SCIP toolkit", for more on this, including lots of references to event intelligence articles and materials.

The bottom line is that whether you are looking for webinars, seminars, books or articles, there are now lots of ways for you to learn how to run a good event intelligence program. So, while you may have some good excuses for breaking your New Year's resolutions, there is no excuse for breaking event intelligence resolution #1.

RESOLUTION #2:

I will convince senior management of the importance of trade show intelligence

Several years ago, I helped set up a trade show intelligence program for a multi-billion-dollar company. The senior vice president bought into intelligence, but thought that going to a show was a waste of time: “If a competitor asked me for information, I would lie to them.” Well, I made sure that this executive accompanied members of the intelligence team to the trade show. And this was his reaction after going to the show: “I can’t believe how much information you can get from these events.” My biggest battle has been to convince senior managers that intelligence needs to be integrated into every trade show initiative. But after doing this at one show, my problem after that was meeting the executives’ new CI expectations. I have seen this with hundreds of companies of all sizes.

It’s all about ROI, and event intelligence can have a significantly positive impact not only on intelligence ROI, but also on the organization’s overall event ROI. Let me give you a few examples and ideas to share with your senior management.

My first piece of advice to you is to read an article I published in the January/February 2008 issue of Competitive Intelligence Magazine, called “Dear ‘C’ – Please Give Me the Resources for a Trade Show Intelligence Program”. It provides lots of tips to help convince senior managers of the need for an event intelligence program. Get a copy of it.

Secondly, there are some nice quotes about the effectiveness of trade show intelligence that I have found resonate well with senior managers. Here are a few that you should share with your senior management. The first quote comes from Joe Goldberg, a past president of SCIP and at the time of the quote he was senior director of intelligence at Motorola.

> ***“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)**

Not a bad quote for the ROI of trade show intelligence and the potential effectiveness of trade shows, as part of the organization’s overall intelligence efforts. I also like Vernon Prior’s quote about CI (Vernon was a very well-respected CI practitioner): “Properly organized, a competent well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances” (1996). This is just another great example of the potential benefit of trade shows for your overall intelligence needs.

Here is a third set of facts you can use to bolster your case for trade show intelligence. It comes from a recent global competitive intelligence study conducted by Calof, Sewdass and Arcos. The study found a link between trade show intelligence and innovation. Companies that rated themselves as leading the industry or being above average in adapting to environmental changes assessed trade shows as being more important, and were more likely to develop formal intelligence plans for events than those firms that rated themselves as being average or below average in adapting to environmental change. The bottom line is that we now have research results, quotes from executives and consultants, and lots of great case examples that you can use to help convince management of the importance of event intelligence.

RESOLUTION #3:

I will look for ways to help my company's trade show team, whether I am going to the event or not

Whether you are going to the trade show or not, there are many ways for you to support your trade show team and help your organization increase their trade show ROI, thereby showing that intelligence can help other parts of the organization. Here are three ideas for you to consider.

- Trade show team to acquire intelligence-related skills, such as how to interview: Offer to teach the team who will be staffing your company's booth how to be effective interviewers. They will be doing a lot of talking at the booth, interviewing potential customers and others, and I suspect that they have not been properly trained in how to do interviews, how to elicit customers' needs, etc. Some of the materials mentioned under resolution #1 provide valuable interview tips, and your CI experience should give you useful experience and knowledge of interviewing which you can share with the trade show team.

- Intelligence support for the company's trade show objectives: Find out what your organization's objectives are for going to the trade show and then look at how intelligence can support these. For example, Holly Barker, in writing about hot trends in trade shows for 2017, noted that the number one focus is customer retention with personalization towards the customers. This looks like a perfect opportunity to support your trade show team with customer profiling. You can train them to do it, support them either at the show or from headquarters by doing the profiling yourself, or even help them develop appropriate forms for doing the profiling. What questions should they ask in order to do the profiles? CI is well placed to recommend the right questions. More and more companies are using trade shows to assist with their innovation and, in particular, their open innovation program, using the show to look for technologies, people, and ideas. This is a great opportunity to provide support by using technology intelligence analysis techniques.

  Find out what the objectives are for going to the show and then identify how a systematic intelligence process can help your organization attain their trade show objectives. Even if you cannot be at the show, you can offer your trade show team advice on how to accomplish their objectives.

- Intelligence support for choosing the right shows to go to: Kai Hattendorf, in looking at trade show trends for 2017, highlighted the impact of growing global uncertainties and geographical polarization of trade shows as making it increasingly difficult to choose which events to go to. These are areas where CI analysis techniques, such as scenario analysis, should be able to help. CI has a variety of environmental analysis techniques that should help your company address these uncertainties.

CONCLUSIONS

Trade shows, conferences, and other live events represent the second largest communication investment for organizations. They are expensive and over the past few years, investments in these activities have declined due to economic pressures. However, predictions are that trade show activity will increase in 2017 and beyond. The Center for Exhibition Industry Research (CEIR) predicts growth in 2017 and a record high in 2018 (Hil, 2016). Exhibitor Online reports that 68 percent of event organizers surveyed expected an increase in exhibitors participating in 2017 shows, 58 percent expected increased attendance and 64 percent expected an increase in net exhibition hall square footage. At the same time, how companies use trade shows, why they are there, and how attendees visit and experience trade shows have changed. All of these changes point to an increased need for a well-run event intelligence program. It is a great opportunity and if you can adopt the three-event intelligence New Year's resolutions in this article, and take the advice provided, 2017 will be a great year for your intelligence program.

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Trade Show Trends for 2012 Bode Well for Competitive Intelligence

Competitive Intelligence Magazine, January–March 2012

According to Event Marketer, “the event and trade show industry is getting refined, redefined and reinvented”. Countless articles confirm this. Is this good news or bad news for event intelligence?

The past few years have been difficult for both trade show and intelligence investments. With the global recession and increased competition, budgets for both have been under pressure. Furthermore, from everything I have read, defining their return on investment (ROI) is becoming more and more crucial to justify event participation. However, the 2012 trends for trade shows present excellent opportunities for competitive intelligence – if it can help management make the link between these trends and what competitive intelligence can do for them. The bottom line is, if handled right, event intelligence investment should be on the rise.

Global Experience Specialists (formerly GES Exposition Services) recently published their annual summary of the top 50 trends impacting trade shows and events. This report looks at top trends in the following areas: marketing and planning, technology, making connections, booth design, and trade show tools. The report does not specifically focus on event intelligence. However, in looking over the trends, it is remarkable how many of them have positive implications for competitive intelligence.

Similar to many other reports looking at the trade show industry, GES confirms that the industry is in the midst of change (p. 2):

> ***“2012 ... is being referred to as the year of change, and indeed it will be. Never before have marketers focused so heavily on change. Events and trade shows are getting analyzed, strategized, built and deployed with one thing in mind: a return on an investment. Passive and tactical programs are getting upgraded as marketers build all-new portfolios”.***

In this era of change, GES’s 50 trends collectively show organizations what to expect when they seek to maximize their trade show ROI. In this column, I will quote selected trends from this report, and briefly discuss the competitive intelligence (CI) implications and what you, as intelligence practitioners, may want to do to take advantage of those trends. The authors of the report challenge their readers to check off the trends they are following or plan to follow in the coming year. I similarly urge you to check off the ones that your organization is currently following (or plan to follow) and identify how competitive intelligence can be involved.

1. Dedicated post-program analysis

“Having a goal and then setting objectives to accomplish that goal is hardly a new trend, but one practiced by the most successful exhibitors and meeting producers. The final step is measuring ‘post mortem’ to determine whether they accomplished their mission or not. Those who do this consistently show better results. It’s that simple.” (p. 3).

2. Leveraging research

"The more you know, the better you'll be able to connect. Event and trade show teams are leveraging market research, focus groups, audience segmentation reports, and even deep analysis of competitor booths and events. The insights are provided in real time, and relevant data is applied to create better and stronger experiential programs" (p. 3).

Both of these trends have competitive intelligence written all over them. Analysis and research are the cornerstones of an intelligence program. When leveraging research, the goal is to not only develop integrated, in-depth intelligence before the event but also to develop intelligence on competitors at the event. It is not reasonable, for example, to do a deep analysis of competitor booths if you do not have dedicated resources at the event to do this. Furthermore, this type of analysis is something that few in the organization, besides competitive intelligence staff, are trained for.

Finally, GES asks that information from the show be analyzed to help develop better future event practices. This certainly sounds like a key intelligence topic and once again something our field is well suited to do. My recommendation is that you show management how competitive intelligence toolkits can respond to both of these identified trends.

3. Connective planning

"More marketers are planning events and trade shows as a 'group' of activities connected to one single portfolio. Treating the programs as part of the sum-of-all-things helps create smarter, more integrated programs that are more efficient and more effective than the disconnected programs of several years ago" (p. 3).

4. Co-location logistics

"Pre-planning is essential to making budgets go further. Where possible, event producers are scheduling trade shows and conferences back to back in hotels and convention halls to capitalize on infrastructure and equipment costs, and renting tactical equipment such as forklifts for a month instead of four days, and re-using items when possible" (p. 3).

These two trends somewhat surprised me. For years, CIM and SCIP materials have talked about the need to link events together to create an integrated event intelligence program. For example, in the SCIP book, Conference and Trade Show Intelligence, Daniel Himelfarb in his chapter titled "Multi-year trade show attendance and its impact on intelligence gathering", writes not only about linking shows together on an annual basis, but also linking individual and regional shows throughout the year to identify trends by running similar key intelligence topics at these different events.

In addition, the back-to-back show approach is also common within our field. My recommendation on this one is to make a presentation to management on these topics. Show them your annual event intelligence plan, and how you link (or should link) events together. Then talk about how this concept can be applied not just for intelligence planning but also for overall event planning. Our event intelligence planning forms and concepts are easily convertible for other elements of trade show management. This may be a way to show how you as an intelligence officer have skills and processes that can help other parts of the organization.

5. Social media

"It's not a trend; it's a reality. Every event, conference and trade show is leveraging Twitter, Twitter walls, Facebook, YouTube and other social networks to engage and inform attendees. Social media is a great way to keep in touch before, during and after the event. It can be a great platform for content delivery, on-site interactives and remains the hub of true digital+live experiences" (p. 4).

Global Intelligence Alliance has called social media one of the top competitive intelligence trends. Several of my columns have been about social media, and SCIP has had webinars on the topic. Social media is a key area of investigation within SCIP. As a result, we have a lot of material that you can bring to management's attention and show them how social media can help engage and inform attendees.

We even have best practices in how to use social media to maintain contact with attendees. This is one of those areas where competitive intelligence leads. My recommendation is that you gather these SCIP materials (and perhaps conduct some additional research at the SCIP conference in Philadelphia this year) and present how to use social media for events, to your management team. You do not have to use the intelligence word on this one, as the social media needs identified by GES are the same as the ones we have in competitive intelligence.

6. Smarter lead retrieval

"Lead retrieval systems are playing a bigger role in managing the experience for the attendee in the trade show booth. In the old days, attendees would scan their badge and the exhibitor would know their basic information. Now, smart lead retrieval systems reveal much more than that. They can tell if attendees are already customers and if so, how important they are, their buying history and who their sales rep is. If the attendee is a prospect, pre-show research tells the exhibitor why this attendee was targeted and who might be competing for his business. It's all pre-loaded onto the attendee's badge, ready for the booth personnel to interact with on screen. The end result is a more worthwhile experience for exhibitor and attendee" (p. 4).

Now this most definitely is competitive intelligence. We call it profiling, and through our collective knowledge and experience within SCIP we have developed substantial knowledge about what information should be collected to properly profile potential customers.

Why not offer management your expertise in this area? Help your organization develop a proper profile system. Take a look at the book, Strategic and Competitive Analysis, by Craig Fleisher and Babette Bensoussan – it has a great chapter on profiling. Several senior SCIP practitioners with event intelligence consulting practices also have a wealth of knowledge and experience in this area. For example, Alevant, a company run by Kent Potter, who is a very active and experienced SCIP member, has an expert lead system. The system uses debriefing experts and a transcription service coupled with analytical methods to capture qualified leads, plus critical contextual information from the event sales team.

The methodology provides sales teams with the previous day's transcribed information in an actionable format, thereby giving the sales team a daily action plan. So, if an objective of your organization's event program is a smarter lead retrieval system, then competitive intelligence profiling approaches and analytical methods are potential solutions for you.

7. Personal engagement

"In this age of 'have it your way', event producers recognize the value of creating a more personal experience for attendees. Rather than just handing out information, they're pushing it to attendees' smartphones and other devices where they can interact with it, perhaps to order literature after a presentation or buy the speaker's book. Likewise, plasma screens on the show floor make it easy for attendees to find sessions they want to attend. It's all about the attendee" (p. 5).

8. Customer paths

"In many cases, experienced designers are building event footprints around the "paths" that different types of attendees or buyers will take. And they're targeting content, product and messaging around those paths, thereby preventing attendees from being exposed to anything that's not relevant to them." (p. 5).

9. Attendees on a mission

"Few buyers are attending trade shows or conferences just to kick the proverbial tires. They may be retail buyers looking for a new product to stock in their store or computer aficionados looking to network. Whatever the case, they have a reason for registering and an objective to achieve in order to justify attending the event." (p. 5).

These three trends are something I have been seeing, hearing and reading a lot about over the past few years. People attending shows on behalf of their companies have a job to do (and it is not partying like it was in the past). Many attendees have decision-making abilities and their actions are more targeted than ever before. The three trends GES identified above point to this and provide a warning to companies that they had better be ready for this new breed of attendee.

From a competitive intelligence perspective, these three trends also point to the need for better profiling of participants and much more pre-event research being done. For example, "customer paths" require profiling of different groups, what their different needs are, and so forth. To do this type of customer path analysis, you will need to learn what types of customers have been at the event in the past, how this group is changing, who is expected at this show, etc.

All of this is intelligence. Consider making a presentation to management, highlighting the intelligence solution to these three trends.

10. Better-equipped salespeople

"Event personnel are better educated and equipped with personal demonstration systems. Most are carrying electronic tablets to identify clients and push out the demos and literature. They're confident, capable and comfortable doing it all with iPad in hand. They're also receiving more training from the event department and being held to more stringent post-program follow-up and reporting. And at the center of many of these upgraded sales folks? Professional trainers brought in to train anybody and everybody who will be in that booth about the goals and objectives, the products and services on display and the best way to interact with attendees" (p. 5).

11. Smartphone apps

"Creating customized smartphone apps that attendees can download and view later is a great way for companies to extend their reach beyond the event. An exhibitor at a recent American Diabetes Association conference created an app that went viral after physicians downloaded it at the meeting, and then mentioned it to patients who also downloaded it. The app contained tips for a healthy diet, links to restaurants and menus and other helpful info. Companies that produce similar apps win friends and widen their exposure" (p. 7).

12. iPads for attendees

"Exhibitors are ramping up the pathway experience through their events by lending iPads or other tablets to attendees who interact with its camera feature as they go through the exhibit. After checking into the redemption counter and handing off a passport or other form of photo ID which is held under lock and key, attendees use the tablet to snap QR codes throughout the booth, which immediately downloads and allows them to view video content or other data. By the time they leave the event they receive an email with an electronic link to what they've just explored" (p. 7).

Of all the trends identified by GES, these three excite me the most – they provide an enormous opportunity for competitive intelligence. The use of smart technology (tablets, iPads, smartphones etc.) is becoming the norm and represents a significant opportunity for intelligence. For example, since most people are comfortable with phone and tablet/iPad applications, why not develop an event intelligence application? It could enable your workforce to collect information at the event and automatically upload it to an intelligence analysis system. The app could have a validation element, source identification elements, and so forth.

At the Telfer-IBM Center for Business Analytics at the University of Ottawa, we are working on an iPad business analytics application. Imagine having at the event a high-level gathering and analytical capacity accessible to your entire team on smart technology. I have been using an iPad for recording interviews and graphics for post-event analysis. As a result of these technologies and people's comfort in using them, many more opportunities exist for your intelligence efforts. I expect to write more about this in future columns.

CONCLUSION

2012 is going to be a year of great change in the trade show industry. These changes provide enormous opportunity for competitive intelligence, provided you can link these trends with their corresponding CI solution. This article has reviewed 12 of these trends, as identified by the GES Trendtracker report and corresponding recommendations for how competitive intelligence can take advantage of them. In my next column I will look at more trends from the GES report and other sources so that CIM readers can help their organizations attain a better ROI on their trade show investments.

The GES report and highlights can be seen at https://www.slideshare.net/GESinc/ges-2012-trend-tracker

Event Intelligence During COVID-19: Top Six Tips for Virtual Trade Show Intelligence

Competitive Intelligence Magazine, June 2020

I have attended several intelligence events lately and a major topic is the impact of COVID-19 on competitive intelligence, and within the event/trade show community its impact on the practice of event intelligence. This article will offer ideas on how to be "event intelligence effective" during COVID-19 and beyond, as the situation unfolds. The most important thing for intelligence professionals to take away from this article is that event intelligence is as important as ever, and opportunities to use your event intelligence skills still exist. However, it is necessary to adapt.

I will start with a reminder: events refer to any places where multiple people get together, whether physical or virtual. Past articles have looked at the event intelligence opportunities at trade shows, conferences, trade missions, webinars, parties, and even hockey arenas. While the last few months have been filled with many such events, all of them have been virtual.

For example, I have attended an intelligence conference in Germany, participated in a trade mission to Vietnam, attended trade shows, and served as a mentor at the Techstars Global Online Start-up Weekend. All virtually. From each of these events I gathered valuable information, made new connections, started new projects, and helped secure several business opportunities. I have learned several things from participating virtually that I'd like to share.

TIP #1: FOCUS ON FRIENDLIES

Now more than ever a warm introduction is needed, so this is perhaps the most important tip. When you profile those in attendance, identify the people you want to connect with and then identify points of commonality. The easiest way to do this is look for level one or two connections on LinkedIn. Think of these as your "friendlies" (see my 2019 article in CIM for more specifics on finding someone in your network to help you reach out to those you're not connected to). One extra benefit of virtual events: you can do quick research (via LinkedIn, Google, Owler, etc.) on a target before reaching out, far more easily than at an in-person event.

Let me share two examples of how this works in practice. For the event in Germany, we used emails and Zoom chats to connect, with the best results coming when we established some commonality with friendlies. On the trade mission to Vietnam, we had trouble connecting with a potential partner until we found a friendly to reach out on our behalf. We quickly got a response and connected virtually. When stress levels are high and people are legitimately concerned about their family, health and economy, they are less willing to connect with strangers, but still want to pursue business opportunities. Friendlies can help bridge that gap.

TIP #2: NETWORKING AND INTERVIEWING VIRTUALLY IS DOABLE, BUT BE FLEXIBLE

Organizers of virtual events are working hard to create meaningful opportunities for participants to network, see who is attending, and have virtual conversations. Here are three examples of how to capitalize on this:

1. **Use private chat to contact a speaker**: At a recent virtual conference, a speaker who was not part of my event collection plan said something that I wanted to follow up on. Since his comment suggested an interesting opportunity, I needed to pivot and be flexible. While connecting with a speaker at an in-person event can be difficult, it was easy at the virtual event. I sent him a private chat message, we had a great conversation, and are now working on a project together.
2. **Skip the awkwardness with private chat**. Initiating a conversation at an in-person trade show can be awkward. For example, what is a good opening line? What is the best body language? However, at a virtual show it can be easy. I typed a message in the chat box and simply waited my turn. The booth person got back to me, apologized for the delay, and we had a great and informative conversation.
3. **Check the participant list for unexpected opportunities**. At a recent webinar, I unexpectedly "bumped" into a friendly and had a great conversation. Even with the best plans, people you do not expect can show up, so it's important to be flexible and seize the moment when they can help with your intelligence efforts. It's a good reminder to always check the online participant list, and then connect via private chat.

TIP #3: FOCUS, FOCUS, FOCUS

My experience is that in a virtual event I am able to accomplish about 50 to 70 percent of what I can in an in-person event. It is not just developing a relationship with a target that can be challenging in an online environment; it is the technology itself. Chats can be slow, video or voice conversations can have buffering or lag issues, and we all are more easily distracted. For example, at one event I had a discussion with four people at a booth. All were at different locations and most of the conversation was each of us repeating, "Can you hear me now?" In an environment like this, we need to be realistic about what we can accomplish. Therefore: focus, focus, focus.

TIP #4: ADD PEOPLE FROM YOUR NETWORK TO YOUR EVENT TEAM

One of my past columns was titled "Who Should You Bring to Events?" The key message in that column was that there are great benefits from bringing functional experts and specialists to events (for example, your R&D staff are great at discussions about technology). While bringing extra people to in-person events can stretch budgets, there can be a substantial payback. Since budget is generally not an issue for virtual events as there is no travel cost (although there is a registration cost), there is a great opportunity to expand your event intelligence program simply by bringing others to the online event. This "open intelligence" concept holds enormous potential for virtual events. By inviting other members of your organization, customers, suppliers and even stakeholders into your intelligence process, you stand to gain a great deal.

TIP #5: MAKE A GOOD IMPRESSION USING THE TECHNOLOGY

Networking is generally enhanced when you make a good first impression. How you look and how you come across has a major impact on the effectiveness of your event interviews. This also holds true for virtual events. Unfortunately, between poor lighting, technological hiccups, and improper digital etiquette, we are often not making the best impression virtually. Here are two tips to make a better virtual impression:

1. **Talk standing up**. You look more honest and approachable when the camera is at eye level (this is a TV tip). When you are standing, you are typically more energetic which creates a more positive impression. To make this happen, place an external webcam on a tripod (an ironing board will work in a pinch). If you do not have an external webcam, then put books under your computer. Just make sure they're stable and straight.

2. **Ensure a high-quality connection**. It's a simple thing, but plug your computer into the modem via a hard line, rather than WiFi. This typically makes a connection more stable, and faster. It's a small thing but it helps make a better impression.

I could devote an entire column to ways of making a better presence for networking online. With the help of a Hollywood producer/director friend, I now have an event "set" that includes production lighting, slider, wireless microphone, a big TV, and more. Feel free to email me if you have any questions about my setup.

TIP #6: GET TO KNOW THE TECHNOLOGY PLATFORM

In the last week alone, I have attended virtual events using several different platforms, including Brella, Slack, YouTube, Webex/GoToMeeting, Zoom, and even a proprietary system. While each show had opportunities for virtual chats and meeting rooms, each show's communication system operated differently, and each show had a different look and design.

On the positive side, several booths had more company personnel (including R&D) than I'm used to seeing at in-person events, which is an advantage of a virtual show. That can create a far richer intelligence environment than in-person events. However, in many shows it can be a challenge to navigate the "floor", finding people and even figuring out how to talk to them. At one show in particular, the initial discussion with booth staff had to be held in a very public chat box, which was a big downside. I wasn't alone in having difficulty navigating a virtual floor. Two colleagues said that they either couldn't find the booths they wanted or couldn't figure out how to engage with the booth personnel. Both eventually gave up.

Therefore, my final tip is to **get the lay of the virtual land as early as possible**. If the event allows it, enter early. Find out what tools the event has to help you find out who is at the show (not every show lets you do this). Look at the menu layout and figure out how to find all the event activities. Find out where the trade show floor is and how you find a specific booth. Figure out how to talk to booth personnel, panelists, speakers, and attendees. If there is a help function, find out how it works and what it covers, and how to contact someone for help. Another way is to find out what platform they are using and check if there is a video that shows the platform in use (maybe on YouTube?). I have found that the basic structure of the event remains similar, show to show, on the same platform.

Bottom line: do not hesitate to reach out to the event organizers well before the event starts to find out how to navigate their trade show virtual environment. Navigating and using these virtual platforms is the biggest issue I'm seeing compared to in-person events. If you don't figure it out, and early, you won't get much of a chance to use your event intelligence skills.

CONCLUSIONS

As this article has pointed out, regardless of the changes arising from COVID-19 to trade shows and events, event intelligence remains an important and powerful tool for intelligence and insight professionals. The article has pointed out how some elements of event intelligence practice can benefit from online events, while recognizing that other elements from our event intelligence toolkit can’t be used or will need to be modified. Regardless, there is enormous opportunity for successful event intelligence practice, even during COVID-19 times.

About the author

Jonathan Calof has been active in the trade show and event industry since the age of 12. He has built and set up booths, been a boother, and has run numerous trade show intelligence programs around the world. He has shared his considerable insights and expertise with countless organizations, helping them to optimise their participation at trade shows, conferences and workshops. He has even led companies to virtual events. Jonathan also pours the knowledge and experience that he has accumulated over several decades into a column he writes on event intelligence for *Competitive Intelligence Magazine* – the top magazine for competitive intelligence and market insight practitioners.

Jonathan is a full professor at the Telfer School of Management at the University of Ottawa (Canada), Leading Research Fellow at the Higher School of Economics in Moscow (Russia), extraordinary professor at North-West University (South Africa) and adjunct professor at the University of New Brunswick (Canada) where he also holds the UNESCO Chair in Anticipatory Systems for Innovation and Venture Creation. He has been the recipient of several awards, including Frost & Sullivan's Lifetime Achievement Award, and both the Fellows Award and the Distinguished Member Award from Strategic and Competitive Intelligence Professionals (SCIP).