

Critical Issues On The Agenda

8:30 a.m. - 10:20 a.m.

I. What Is Competitive Intelligence?

— Arik Johnson

- A. Overview
 - 1. History Of Competitive Intelligence (CI)
 - 2. The CI Cycle
 - 3. Strategic versus Tactical Intelligence
- B. Collection Methodology And Techniques
 - 1. Human Services
 - 2. Document Services
 - 3. Intelligence Within Your Own Enterprise
- C. Analysis: Giving Meaning To Information
 - 1. Future Scenario Planning
 - 2. Implications And Situation Analysis
 - 3. Competitor Profiling
 - 4. Sales And Marketing Applications
 - a. Sell Against Strategy
 - b. Walletshare And Cross Marketing
 - c. Product Marketing Involvement For Next General Product Development
 - 5. SWOT And SPACE Analysis
 - 6. Financial Metrics
 - 7. Vendor Analysis
 - 8. Partner Analysis
 - 9. Competitive Benchmarking
- D. Completing The Intelligence Cycle
 - 1. Continuous Feedback
 - 2. Key Intelligence Topics
 - 3. Early Warning
 - 4. Current Awareness

10:20 a.m. - 10:30 a.m.

Break

10:30 a.m. - 12:00 p.m.

II. What Is Competitive Security?

— Anthony E. Cooper

- A. Identification And Mitigation Against Threats
 - 1. Theft Of Trade Secrets
 - 2. Subversion Of Infrastructure
 - 3. Deliberate Or Accidental Misinformation
- B. Recognition Of Potential Sources Of Threats
 - 1. Co-Workers Competing For Jobs
 - 2. Departments Competing For Budgetary Dollars
 - 3. Companies Competing For Market Advantage
 - 4. Foreign Governments/ Companies
- C. Targeting Possible Means Of Compromised Security
 - 1. Uninformed Or Inappropriate Use Of Security
 - 2. Accident
 - 3. Deception
 - 4. Poor Information Security Procedures

- 5. Surveillance
- 6. Recruited Spies
- 7. Physical Penetration Of The Site
- 8. Computer System Penetration
- D. Security Damage Assessments Metrics
 - 1. Lives Lost
 - 2. Physical Damage Incurred
 - 3. Assets Lost Or Impaired
 - 4. Markets Lost
- E. Appropriate Appreciation Of Requirements Set Forth By Laws/ Regulations And Directives Like:
 - 1. PD-63 Addressing Privacy, Cybercrime And Terrorism
 - 2. Health Insurance Portability And Accountability Act (HIPAA)
 - 3. Gramm Leach Bliley Act
 - 4. The Economic Espionage Act
 - 5. The National Infrastructure Protection Act (That's Only The Beginning)

12:00 p.m. - 1:00 p.m.

Lunch (On Your Own)

1:00 p.m. - 2:50 p.m.

III. Competitive Security Infrastructure And Tools

— Anthony E. Cooper

- A. Ranking And Definition Of Security Threats
 - 1. Asset Protection
 - 2. Maintenance Of Trade Secrets
 - 3. Physical Security
- B. Creation Of Corporate Security Assets
 - 1. Chief Risk Officer With Sarbanes-Oxley Responsibilities
 - 2. Executive Risk Council (To Identify Strategies And Compliance From Cross-Functional View)
 - 3. Techniques For Prevention Of Panic
 - 4. Maintaining Balance Between Security And Free/Open Environment

2:50 p.m. - 3:00 p.m.

Break

3:00 p.m. - 4:30 p.m.

IV. Ethics And Components Of A Solid System For Competitive Intelligence

— Arik Johnson

- A. Intelligence Infrastructure And Tools
 - 1. Relationship With Knowledge Management
 - 2. Software Applications
 - 3. Budgets And Headcount
- B. Counterintelligence: Protecting Your Company
 - 1. Vulnerability Analysis
 - 2. Creating Awareness To Prevent CI
- C. Ethics And The Law
- D. Insights On CI In Asia, Latin America, Europe And Corporate America

The Benefits For You

Monumental changes have occurred in the environment in which business managers and professionals find themselves. Survival requires exceptional knowledge of competitors and adequate protection of trade secrets and infrastructure. Large corporations have to operate their own corporate intelligence/security departments. This seminar is for managers and professionals who are new or unexposed to corporate intelligence/security.

This seminar will include:

- **Learning How Competitive Intelligence (CI) And Competitive Security (CS) Are Used By World-Class Organizations**
- **Learning How To Protect And Defend Against Competitive Intelligence And Other Security Threats Conducted By Your Competition And Other Parties**
- **Seeing How CI Supports Strategic Planning, New Product Development, Sales And Marketing Success And Security**
- **Learning Competitive Security Insights Every Workplace Survivor Should Possess**

Who Should Attend

This seminar is designed for human resource managers, payroll managers, benefits administrators, business owners and managers, directors, CEOs, CFOs, operations managers and accountants.

Written Materials

You will receive a professionally prepared manual at this seminar. This manual has been compiled by the faculty specifically for this seminar.

Audiotapes

The seminar will be audiotaped. If you cannot attend, you may order a set of the audiotapes and the accompanying manual from this program by using the registration form on the back panel. For other related products, refer to the enclosed Lorman Bookstore or visit us online at www.lorman.com. Please allow four to six weeks after the date of the seminar for delivery.

Continuing Education Credit

CPE Credit: Maximum Credit Hours: 8.0 each session (based on a 50 minute credit hour). Field of Study: Specialized Knowledge and Applications. Prerequisite: None. Level of Knowledge: Intermediate. Teaching Method: Seminar/Lecture. Advance Preparation: None. Please refer to the information in this brochure for outline, course content and objectives. Upon completion of this course, you will receive a certificate of attendance.

Our Distinguished Faculty

Anthony E. Cooper

Anthony E. Cooper learned the hard way that a failure to understand corporate and/or government security requirements and an overreaction to unexpected situations can potentially harm a corporation and inflict personal harm and career damage. Mr. Cooper will share insights learned from his experience and personal research to discover what happened to him. Mr. Cooper has produced a set of security risk management tools using skills acquired through graduation from the University of Wisconsin-Madison in economics and attainment of certifications as a Certified Fraud Examiner (CFE) and Fellow of the Health Care Financial Management Association (FHFMA). Some organizations that provided assistance to Mr. Cooper's journey towards self-awareness on this topic include Minnesota Infragard and the Wisconsin HIPAA Collaborative Workgroup (HIPAA COW). Mr. Cooper is creating an organization, Paladin's Arsenal, whose purpose is help corporations and/or individuals surmount the security risk management dilemma.

Arik Johnson

Arik Johnson is managing director and chief executive of competitive intelligence systems and the research bureau of Aurora WDC, where he advises business leaders hoping to better understand competitive forces in their industry. Having earned degrees in international business, history, political science and international relations from the University of Wisconsin-Madison, he is the Wisconsin Chapter chairperson of the Society of Competitive Intelligence Professionals (SCIP), writes a weekly, nationally syndicated column on business competitiveness and management best practices and is contributing editor to several periodicals on CI topics.

General Information

Madison, WI • January 30, 2004

The Madison Concourse Hotel and Governor's Club • One West Dayton Street
 Registration: 8:00 a.m. - 8:30 a.m. • Session: 8:30 a.m. - 4:30 p.m.
 Lunch Break: 12:00 p.m. - 1:00 p.m. (On Your Own)

To register: Refer to registration form on the back panel.
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 Cancellations: Substitute registrants are welcome and may be named at any time. If you cancel six or more business days in advance, you will receive a full refund, less a \$20.00 service charge. If you cancel within five business days you are not entitled to a cash refund. However, as a courtesy, we will allow you to apply your payment toward any future Lorman seminar within one year from the date you cancel. Your payment is transferable. Please note that if you do not attend and you do not cancel as described above, you are responsible for the entire payment.
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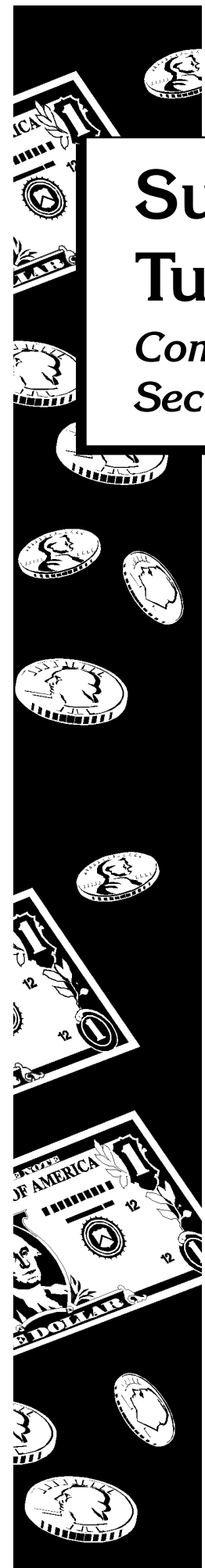
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Madison, WI
 January 30, 2004

Anthony E. Cooper
 Paladin's Arsenal
 Arik Johnson
 Aurora WDC

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