



# DELIVERING THE COMPETITIVE INTELLIGENCE PROFESSIONAL

Capitalising on Knowledge for Innovation and  
a sustained competitive advantage

26<sup>th</sup> & 27<sup>th</sup> of August 2004 Four Point by Sheraton Darling Harbour Sydney

Your distinguished  
workshop leader :

**ARIK R. JOHNSON**

Managing Director  
Aurora WDC, USA

"If you don't have a  
competitive advantage,  
don't compete."

**Jack Welch, CEO GE**

Learn and leverage from this event by :

- Empowering yourself with the right skills set to become a CI professional
- Understanding how to collect and where to look for competitive information
- Differentiating yourself as the CI professional
- Examining various sources of competitive information : internal, external and online sources
- Comprehending how to get the most out of Trade Shows and Exhibitions
- Scoping out and designing an intelligence project
- Determining the attractiveness of a markets and its viability
- Recognizing when a competitor may be coming to market
- Developing an intelligence plan for collection and analysis of information
- Selecting an appropriate intelligence Competitive Intelligence tool to effectively manage the process
- Delivering intelligence to your users based on Key Intelligence Topics (KITs)

This is a two day hands on training course on how to become a true blue CI Professional. Day one will empower you with CI gathering techniques, while day two will demonstrate how to transform this information into actionable Competitive Intelligence.

This interactive workshop will be aided with real life case studies and touch on two key tools that Arik has widely practiced throughout his CI consulting assignments:

- Key Intelligence topic (KITs)
- Weblogs

Arik's impressive CI consulting assignments include some of the biggest companies in the world such as :

**AT & T Wireless, National Semiconductor, Intel, EMC, ConocoPhillips, MetLife, RR Donnelley, SC Johnson, Invitrogen and Circuit City** just to name a few

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## COLLECTING DATA TO GAIN A COMPETITIVE INSIGHT

There are endless reasons why you might want to gather competitive intelligence about one of your competitors. Competitive Intelligence gives you hard facts on which to base decisions about marketing tactics, R&D investments, product launches and overall business strategy. In order to effectively gather CI, you must have a thorough understanding of what it takes to be a CI professional. It's pivotal that you have the right skills set to be able to effectively collect intelligence.

### DO YOU HAVE WHAT IT TAKES TO BE A CI PROFESSIONAL?

#### SESSION ONE UNDERSTANDING THE CHARACTERISTIC OF A CI PROFESSIONAL

- Defining the traits and characteristics of a successful intelligence professional
- Defining the role of a CI professional in your company's CI initiative:
  - collection, analysis, decision making
- Having the ability to report CI success and demonstrate the Return On Investment (ROI)
- Analysing strategies to avoid being a glorified librarian
- Overcoming legal and ethical concerns – making distinction between CI and espionage

### IDENTIFYING SOURCES OF COMPETITIVE INFORMATION

#### SESSION TWO INTERNAL SOURCES – YOUR OWN ORGANISATION IN ITSELF IS A GOLDMINE OF COMPETITIVE INTELLIGENCE

This session will illustrate the value of tapping into internal intelligence resources, such as your sales force and marketing departments to obtain valuable knowledge about the competitive environment.

- Understanding the CI value of your sales force They are constantly gathering information from customers, trade shows, association meetings and even casual conversations
- Comprehending the CI contribution of your marketing team – They are constantly monitoring the industry, looking for patterns from which to carry demand forecasting and are also constantly monitoring consumer spending patterns to identify your company's most profitable customer segments
- Determining the CI value of your purchasing department – They can reveal who your most efficient suppliers in terms of both cost and delivery times are. Properly leveraged upon it can help you select the right suppliers to forge alliances with.

- Setting up communication channels to take advantage of internal as well as external sources of intelligence

#### SESSION THREE PUBLIC DATA SOURCES – PATENT ANALYSIS FOR MARKET FORECASTING

Patent analysis provides a key tool for CI. By monitoring what the competition is seeking to patent, it provides invaluable information to forecast the market and comprehend what sort of technological and innovative ideas your competition aims to bring to the market place.

- Leveraging on patent analysis to gain a better picture of the technology and market trends shaping your competitive environment
- Gaining a proactive stand to competition by being able to predict and anticipate changes in your competitor's strategies
- Using patent analysis to make strategic management decisions

#### SESSION FOUR ONLINE SOURCES – WHERE DO YOU LOOK FOR COMPETITIVE INTELLIGENCE?

The online world is a very big place and more often than not, it's very easy for the CI Professional to lose themselves amid the various choices of information that's available. This session will outline how to get the most out of your online competitive information search. We will examine the various sources of online intelligence and what you can gain from each of these sources :

- **Company web sites** : Are one of the best sources of basic information about a company
- **Online Publications** : Allows you to search for articles by typing in company name or key executive. Some good examples : CNN, Forbes Magazine, ZdNet, Sydney Morning Herald
- **Monitoring services** : will track a company or industry you select for news. For a fee, it can help you keep track of companies and industries and notify you whenever it makes headlines. Some examples include: office.com, Portfolio News

#### SESSION FIVE ELICITATION TECHNIQUES – ASKING THE RIGHT QUESTIONS

By analyzing primary sources you can learn the most up to date and often the most reliable information. Elicitation allows the collection of specific information without resorting to questions. Direct questions tend to raise questions themselves. They also signal intentions and areas of specific interest, and usually reduces the level of cooperation. This session will suggest some winning elicitation techniques that you can emulate in your own intelligence gathering process

## SESSION SIX TRADE SHOW AND EXHIBITIONS-GATHERING VALUABLE INTELLIGENCE AND INSIGHTS

Trade shows are definitely a fantastic avenue for the exchange of ideas and the collection of intelligence. This session will outline successful techniques that can be deployed when aiming to collect intelligence from trade shows and exhibitions :

- Defining the CI objective of trade shows and exhibitions
- Understanding what you can learn from attending exhibitions and trade shows
- Analysing cutting edge techniques for collecting actionable intelligence at trade shows
- Protecting against rival CI efforts and safe guarding your own interest at trade shows
- Delivering the intelligence gathered from trade shows and exhibitions to internal staff

Day 2  
Friday 27<sup>th</sup> August 2004

## PRESENTING YOUR DATA TO CREATE COMPETITIVE INTELLIGENCE

The data analysis and delivery process in Competitive Intelligence is probably the most important intelligence function. It is in this stage that that meaning is given to data to create intelligence. Today's sessions will discuss why and how analysis can assist your company in its planning and growth activities. Up till now many companies have dedicated large amounts of their resources on data collection, only to find themselves succumbed with mountains of data. In order to ensure that your company can create and maintain its competitive advantage, it's pivotal you are able to interpret and deliver data to decision makers in the form of actionable information.

### UNDERSTANDING WHO YOUR INTELLIGENCE USERS ARE?

## SESSION ONE DIFFERENTIATING BETWEEN TACTICAL & STRATEGIC USERS

There are basically two main user groups of competitive intelligence. Each of these groups have very different needs and approach CI from different angles

- ❑ Analysing the tactical user of CI
- Concerned with Day-to-Day Operational and Business Unit Issues

- Areas intelligence is applied : sales & marketing, product management, cash flow and finance, research and development, purchasing and manufacturing, logistics and distribution
- Key success factor: things the organization MUST execute well in order to be competitive
- ❑ Comprehending the strategic decision maker of CI
- Concerned with strategic issues
- Areas intelligence is applied : mergers and acquisitions, alliances, product instructions, and cooperative partnerships
- Key success factors : ability to be competitively unique, contribute
- Disproportionate Share of Customer
- Perceived Value and business expansion

### DELIVERING THE RIGHT INTELLIGENCE TO YOUR USERS – KEY INTELLIGENCE TOPICS (KITS)

Collecting data is one thing, but **analyzing and delivering the right information is what differentiates CI Professionals from the rest**. In order to achieve this, it is important to have interactive dialogs with decision makers through Key Intelligence Topic (KITs) interviews. Which consists of three protocols : **Strategic decision issues, early warning topics** and an **understanding of key market players** Sessions two through to four aims to highlight what are some of the questions that need to be answered at each of these stages:

## SESSION TWO ANSWERING STRATEGIC DECISION ISSUES WITH ACCURATE COMPETITIVE INTELLIGENCE

- Providing intelligence inputs for the company's strategic plan to create "our" future competitive environment.
- Formulating "our" global competitive strategy: Assess the role of competitors in achieving our business objective(s).
- What plans and actions must we take to maintain (our) technological competitiveness
- Managing new product development and roll-outs: How and when will the competitors respond?
- Analysing how will our new distribution/sales/marketing strategy be viewed by the industry? Our competitors? Our distributors?

### SESSION THREE

#### CAPITALISING ON INTELLIGENCE TO MINIMIZE RISK AND BE PROACTIVE BY UNCOVERING EARLY WARNINGS

- Analysing areas of possible technological "breakthrough" that could dramatically affect our current and future competitiveness.
- Evaluating technological developments, affecting either production capabilities or product development and their uses by competitors and others.
- Understanding the status and performance of Key Suppliers: Their financial "health"; Cost & quality problems; Possible acquisition and/or alliances
- Leveraging on intelligence to counter possible disruptions to supplies
- Anticipating changes to industry policies and processes that can effect competitiveness
- Being aware of companies and/or combinations of companies, considering possible entry into our business or markets.

### SESSION FOUR

#### USING INTELLIGENCE TO COMPREHEND AND DEFINE KEY MARKET PLAYERS

- Providing profiles of our major competitors, including their strategic plans, competitive strategies, financial & market performance, organization & key personnel, R&D, operations, sales & marketing, etc.
- Conducting in-depth assessments of Key Competitors, including: competitive intent vis-a-vis us and our major customers; strategic plans and goals, including international objectives; Key strategies (Financial, technological, manufacturing, business, development, distribution, and sales and marketing); Current operational and competitive capabilities
- Defining new customers, their needs and future interests: What are they and how are our competitors trying to satisfy them?
- Understanding industry and customer views, attitudes and perceptions regarding "worth" of our branded products, services, etc.
- Identifying and assess new industry/market players, including: Suppliers, major distributors, customers and/or competitors, that are considering entry into our business

### SELECTING THE RIGHT CI INTELLIGENCE TOOL

### SESSION FIVE

#### SELECTING APPROPRIATE TOOLS FOR WINNING CI ANALYSIS – USING WEBLOGS

- Evaluating current CI tools : email, file systems, groupware
- Uncovering shortcomings of generally available CI tools – no flexibility to manage and connect knowledge

- Using blogs to aid your intelligence team manage the intelligence process
- Understanding the benefits of weblogs: saves times, improves efficiency, maximises your organisations's ability to leverage CI results
- ❑ Analysing how weblogs work :
  - Article is discovered and collected (or received via email)
  - Article is labeled and initial comments are added
  - Article is distributed via newsletter and Web news page
  - Reader asks a question
  - Analyst writes a response synthesizing relevant information
  - Readers are notified of the response

#### ABOUT YOUR WORKSHOP LEADER

Arik R. Johnson is Chief Executive Officer & Managing Director of Aurora WDC, which he founded in 1995 to advise business leaders on improving their understanding of marketplace rivals, competitive dynamics and extend the value of intelligence & strategy throughout their organizations. Aurora is focused on deploying current awareness and early warning techniques to customers via the firm's two professional service businesses: the Recon Intelligence Outsourcing Bureau, which delivers on-demand research & analysis; and, the Aurora Intelligence Best-Practices Institute, which provides training & consulting advice related to CI. Arik's personal clients number among the world's most respected market leaders and include dozens of recognizable names from the Fortune 500, as well as start-up enterprises and government agencies.

Arik earned undergraduate and advanced degrees in International Business, History, Political Science and International Relations from the University of Wisconsin-Madison and is a leader within the worldwide Society of Competitive Intelligence Professionals (SCIP). Arik writes a daily column called Recon Competitive Intelligence for the AuroraWDC.com Website, as well as contributing to Competitive Intelligence Magazine, KMWorld Magazine and elsewhere, and is a visiting lecturer on competition and intelligence in business at venues throughout the U.S., Canada, Europe, Latin America, Asia and Africa. Prior to founding the firm, Arik was a business analyst with a major international management consulting firm.

#### Course Timetable

Registration	0830
Course begins	0900
Morning refreshment	1000
Course resumes	1015
Luncheon	1230
Course resumes	1330
Afternoon refreshment	1530
Course resumes	1545
End of workshop	1715





**2 DAY WORKSHOP FEE**

- 2 day event @ \$1850 + 10% GST per delegate
- Early bird @ \$1750 + 10% GST per delegate before 8/7/04
- 10% discount for 3rd and subsequent registration (Premier Value)

**Method of Payment :** For crossed cheque / bank draft to be made payable to " **Knowledge Group of Companies Australia Pty. Ltd.** " and courier to **Level 8, 440 Collins Street, Melbourne 3000, Vic.**

For Credit Card Payment, please log on to

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**Cancellations & Substitutions :** All cancellations of registration must be made in writing. If cancellation is received two weeks before the event i.e. 12<sup>th</sup> August 2004 you will be entitled to a 50% refund. Due to contractual commitments no refund will be made for cancellation after 12<sup>th</sup> August 2004. However, a complete set of documentation will be sent to you. Substitutions are welcomed at anytime.

**Hotel accommodation:** Please contact Four Point by Sheraton Darling Harbour Sydney at 02-9290 4000 and quote our event to enjoy privileged room rate.

**Note :** It may be necessary for reasons beyond control, to change the content and timing of the event, speaker(s) or venue. Every effort will be made to inform the participants of the change.

**Please note that payments must be received within 5 (five) days upon issuance of invoice.**

**Please complete this form immediately and fax this to 613-9923 6543**

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**Why You Should Attend!**

Competitive Intelligence (CI) is concerned with the ethical and legal methods companies use to monitor their challengers, identify growth opportunities, understand their own competitive position and improve performance.

CI helps organisations sustain their competitive advantage by providing actionable and reliable input to decision makers at operational, tactical or strategic levels.

This two day workshop will help you acquire the right skills to be a world class CI professional.

Day one will demonstrate techniques and areas to focus on to collect information about your competitive environment.

Day two will illustrate how to analyse this information and present it to decision makers for strategic decision making.

**WHO SHOULD ATTEND**

- Directors
- General Managers
- Managers of Marketing
- Category Management
- Product Development
- Market Research
- Competitive Intelligence
- Strategic Planning
- Analyst
- Risk Management

**BUSINESS OPPORTUNITIES**

This event will offer you an opportunity to gain preferential access to the senior executives in your target market to network and learn from each other. It is an excellent platform to meet decision makers face-to-face to create business opportunities and to enhance your corporate image in the market. Our events are not overcrowded exhibition where you need to compete with over 100 exhibitors. This is a targeted business strategy event where you get to meet the senior decision makers. For further details, please contact registration at 03-9607 1320 or email [registration@knowledgegroupco.com](mailto:registration@knowledgegroupco.com)