

## Working with Friendlies to Broaden Your Trade Show Intelligence Reach

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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.

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## 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.

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## 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.

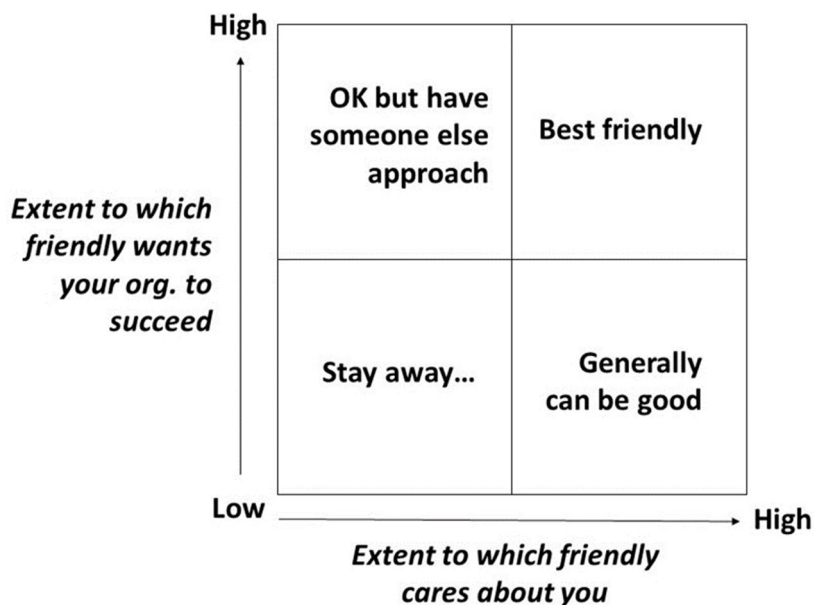
4. **Subject matter expertise:** I have written in many of my columns about the need to bring together people with the appropriate technical knowledge, to be able to both ask the right questions and understand what is said in reply. Not all intelligence needs require subject matter expertise, but as 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.

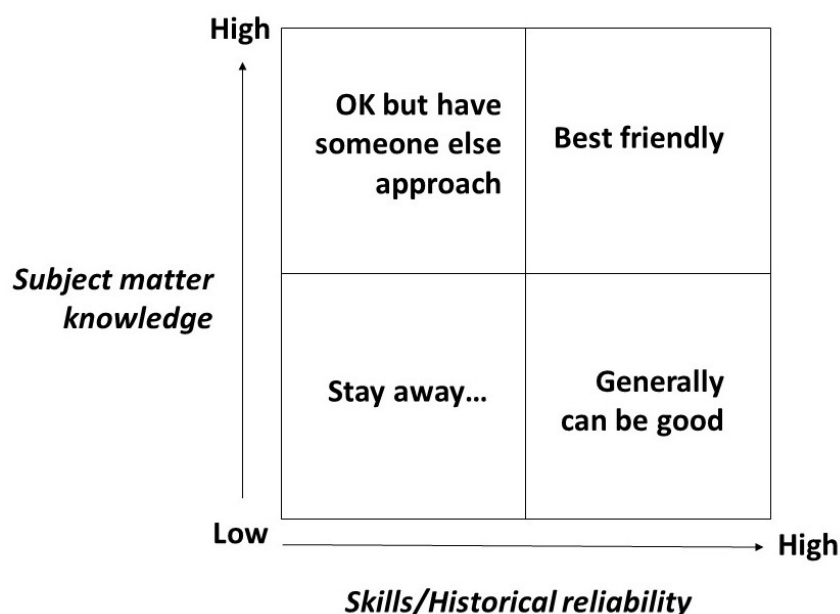
**Figure 1: The friendly selection process**

**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.)



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### 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 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.

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#### **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.

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#### **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.