



CI as defined by the CI Society - SCIP

Competitive Intelligence is a discipline that enables organizations to **reduce strategic risk** and **increase revenue opportunities** by having a deep understanding of what has happened, what is happening, and what may happen in their operating environment. Competitive intelligence professionals are skilled at **ethically collecting** information from diverse sources, using a variety of structured analytical techniques, and communicating perspective and insights to improve the quality of an organization's growth decisions. (Society of Competitive Intelligence Professionals definition, taken from <https://www.scip.org/page/CI-MI-Basics-Topic-Hub> - SCIP 2022)

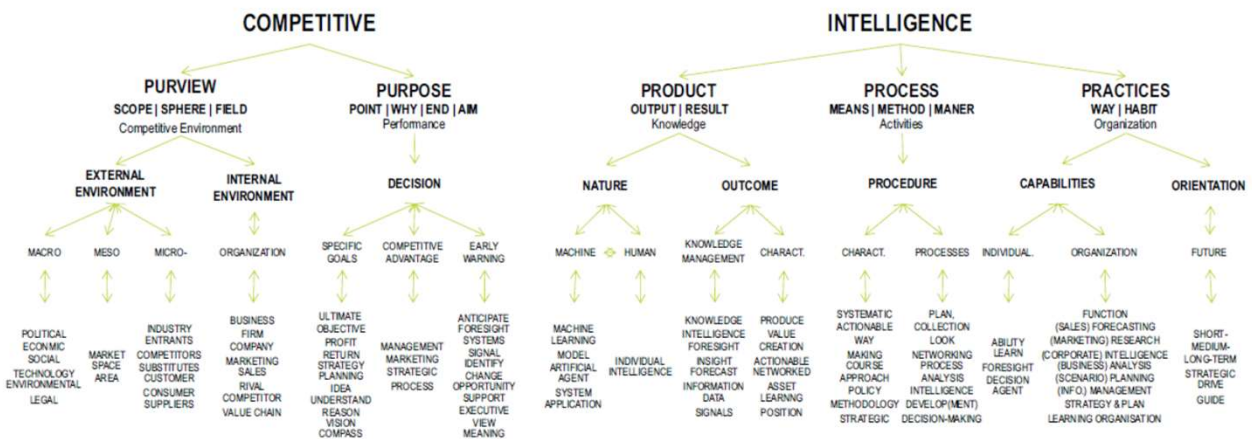
Sharp. Myth 1 CI and Market Research are the same

Important Distinctions	
Market Research	Competitive Intelligence
<ul style="list-style-type: none"> • A snapshot of a particular time. • Tactical and methods-driven. • Draws mostly from consumers. • Relies on direct contact. • Reflects customers' thinking and beliefs, which may be different from reality. • Primarily quantitative with a qualitative component. • Objective: Answer questions. 	<ul style="list-style-type: none"> • An action film where the stars and the plot are always changing. • Strategic and results-driven. • Taps a wide range of constituencies, including customers, competitors, suppliers, distributors, substitutes, etc. • Exploits primary and secondary sources. • Captures the facts--what is actually occurring. • Primarily qualitative; may include a quantitative component. • Objective: Answer questions; Raise questions; Take action.

(Thanks to SCIP member Tim Powell for his contribution)

Madureira et al (2023)

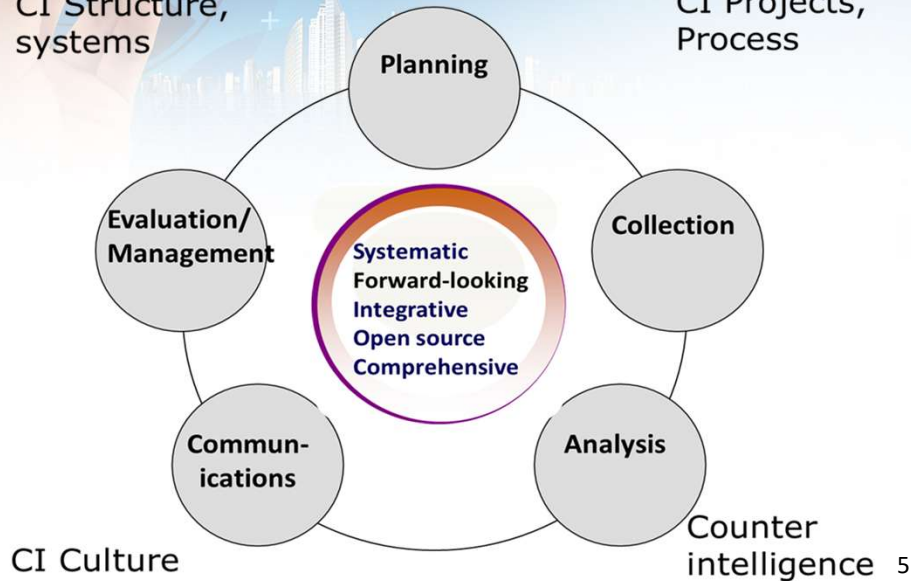
Visual abstract



What is CI: Process, systems, structure, culture and more...

CI Structure,
systems

CI Projects,
Process



The classes

- Class 1: Introduction to CI/MI
- Class 2 : Information collection
- Classes 3, 4: Designing CI/MI projects
- Classes 5,6: Analysis for intelligence and insight
- Class 7 : Designing CI and MI organizations
- Class 8 : Course wrap, discussion of anticipatory systems

Your CI/MI tour guide “Jonathan Calof”

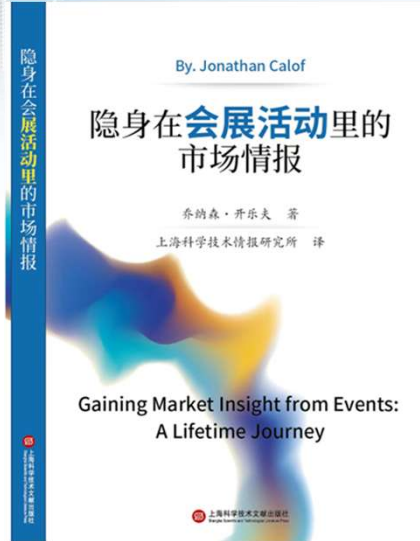
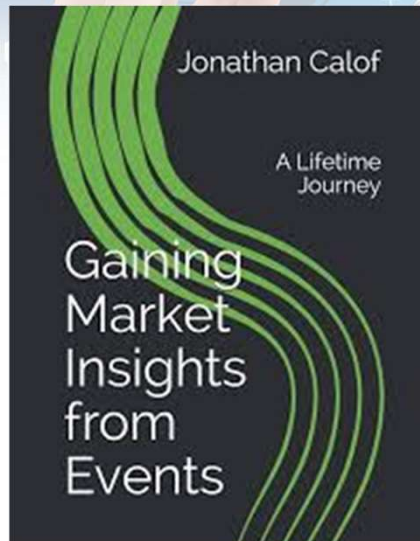
- Professor, Telfer, UNESCO Chair Anticipatory Systems for Innovation and New Venture Creation (Honorary professor in South Africa, China, Russia, New Brunswick in intelligence, foresight anticipatory systems)
- Co-editor Conference and Trade Show Intelligence author Gaining Market Insight from events
- SCIP Fellow and SCIP distinguished members award
- Chair Canada-Ontario Intelligence Center of Excellence
- Vice Chair Pearson Center for Progressive Policy
- Frost and Sullivan Life Time Achievement Award for Competitive Intelligence "one of the world leaders in competitive intelligence" (Edmontonian). "highly sought after, as a consultant, by businesses and government agencies." (CA Magazine) ""éminence grise of Canadian CI theorists" (Report on Business)

And on Friday – being presented in the Canadian Senate with

- In recognition of your notable contributions to Canada through your dedication to academic excellence, strategic foresight, and community service, I wish to award you with the King Charles III Coronation Medal



This is one of the course materials –
available for free for you



Learn from readings, lectures, discussions. You will
learn from us and from each other: Insight Log

Learning and insight logs are to be maintained on a nightly (class-by-class basis). The log gives you a chance to provide feedback on what you are learning in each class. Logs are to be maintained for all classes that we are together and also includes material assigned for readings. What am I looking for in the log? – individual class insights as well as insights from the readings assigned. Each class's entry should be roughly two pages per class, but it can be more.

The insight log – Do it after each class including ones you missed

- i. How your definition of CI and your thinking about it are changing. Include where you see this as being similar or different to concepts you already know about and courses you have already taken such as marketing research, strategy, environmental scanning, risk management, etc. Include examples from the readings and class discussions to back up your evolving definition and thoughts.
- ii. On a class-by-class basis, provide key insights you have gained in each class. Reference specific reading and the insights you have learned from each, reference insights that came from the professor and comments provided by your fellow classmates (including yourself). I expect much of the assigned material to be well represented in the log in terms of insights gained from them not simply a summary of the material.

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The assignment rubric: Exceeds expectations requirements

- **Assigned readings versus class discussion** - Insights from at least 70% of the assigned readings provided with appropriate referencing. Most entries represent key insights and not summaries. Linkages to all classes provided where appropriate. In addition insights are provided from at least 70% of those readings that are not related to a specific class (CI organization, CI within an anticipatory system)
- **Class discussions** - Insights from the professors' comments/lectures and students clearly referenced with all classes covered.
- **Insights developed** – Insight assignment contains short key insights, lessons learned all are clear ahas
- **Style** - Convincing discussion /writing, insightful, assignment questions fully covered. Excellent grammar, language and tone

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What Did Hathaway Say Was Critical for CI ?

- Focus
- Key is planning – this is crucial

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Putting the plan (intelligence or other anticipatory element) together

- Form A: The topic
- Form B: The collection plan
- Form C: Project administration plan
- Form D: Collection forms, templates, etc. (note that the same collection form can be used for multiple intelligence projects)
- For a program
 - List of all topics
 - Individual plans (form A-D for each topic)

Form A: Starting it off		
1 Description of the insight topic including what insights the decision maker is trying to develop.		Pitfalls – advice 1)Line 1 is key make sure its external and clear 2)Line 2 : Ensure you have taken into account time to develop intel + time to make decision + time to implement decision + needed profit/sales/impact time 3)Line 3: What is the decision that could arise from 1+2 (that the organization will be making) 4)Line 4: Look at 1 and 2 and what do you think you will be concluding? 5)Remember you are doing this for a client (or for 6)Make sure it is intelligence
2 How forward looking do you have to be		
3 The decision/action that would be taken with the insight		
4 Hypothesis – If you had to guess know what you think your conclusions would be on #1		
5 Who is the decision maker		
6 For the decision that is being made (#3) how does the organization determine that the decision was successful (and I do not mean because they made it). How does the decision maker measure success, what is their desired outcome from the decision for which the form A is being developed		

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The Form A instructions from the outline

- Assignment
- Based on our discussions in classes 1 and 2 and after doing the readings for today's class - come up with an intelligence/insight idea– this will involve filling in a Form A . Be as thorough as you can be on the form and do not worry about making mistakes as it is not being markets. Email it to me.
- Interesting results
 - Under 50% took advantage of the opportunity
 - You could have chosen anything – personal or other
 - Key was being specific
 - Many were very good starts showing good understanding of the readings and our class discussions especially the Jan Herring reading and the Du Toit reading
 - Some did not do any insight/intelligence ideas but instead treated it as to explain what each of the categories were.

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What would Best Foods form A have looked like (Keep in mind it was an incredible success)

1 Description of the insight topic including what insights the decision maker is trying to develop.	How will the two competitors react to product launch
2 How forward looking do you have to be	3-6 months
3 The decision/action that would be taken with the insight	Launch strategy specifically how much advertising, what kind etc (be specific)
4 Hypothesis – If you had to guess know what you think your conclusions would be on #1	I would have to ask Hathaway
5 Who is the decision maker	Hathaway
6 For the decision that is being made (#3) how does the organization determine that the decision was successful (and I do not mean because they made it). How does the decision maker measure success, what is their desired outcome from the decision for which the form A is being developed	5% market share 3 months after launch

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