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

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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