



Each year I take my EMBA's on an international trade mission

- They represent a Canadian company who is trying to do business in the country we are going to.
- The project starts in January and wheels up is April
- There is only five working days in the market + time in Canada to do the project
- The only resources that they get for the project are themselves (5 team members) + whatever the company can provide

3



The decisions/recommendations on the EMBA International Trip

- Local agent recommendation
- Partner and customer identification (sale completed)
- Playbook with identification of partners (involved foresight)
- Identified four partnership opportunities
- Persona recommendations for potential customers and playbook development as its years away
- Distributor recommendation
- Market entry plan
- Outsource partner recommendation

Form C Planning – Project Work Plan by Brad Ashton

1. **Objectives** - *User Needs & Problem Statement*
2. **Deliverables** - *Intelligence Products*
3. **Work Elements**
 - **Task Activities**
 - *Collection Plan*
 - *Analysis Plan*
 - *Delivery & Applications*
 - **Schedule and Milestones**
4. **Resources**
 - **Funding** (& work breakdown structure)
 - **Staff** (& task assignment structure)
 - **Special services** (e.g. *outsource collection*)
5. **Management Approach** – *organize, direct, control*

Think:
Sequencing

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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)

The forms can be used for intelligence, foresight, market research....

Planning documents and checklist - Excel

jonathan calof

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B5 Planning: what does the plan look like? How are they organizing to develop that insight what are they looking for? How are they getting it? How is insight being

3. VALIDATE THE MARKET: IS THERE A PLACE FOR **** in country

Summary: Yes, there is a place
Data security is not broadly understood yet, but it is growing and that leaves a place for *** to enter.
Recommended distributors knowledge of the local market can help company understand the market potential, including customer segments and pricing, more completely.
Company will need to validate the legal requirements for importing product and, depending on the terms of any deal with Distributor or another partner, should obtain trusted legal advice for setting up a business or partnership in Vietnam.

ID	Planning: what a	ID	POTENTIAL CHALLENGES & MITIGATIONS	ID	INFORMATION STILL TO B
3.1	There is no cultural acceptance barrier to technology in Vietnam. Technology is prevalent and users are savvy.		Many interviewees described Vietnam as a "hard market to crack". Mitigation: Build strong trusting relationships with those who understand the market.	3.17	Rules around importing and using encrypted b This information should be validated with the law firm.
3.2	In Ho Chi Minh City, District 10 is a hub for technology companies.	3.13	In technology, good products are developed regularly although many are not successful because of low sales. Mitigation: This is true in North America and Vietnam. Find knowledgeable local partners who can help network and find sales opportunities.	3.18	IP protection laws and enforcement This information should be validated with the law firm.

1. Action Plan 2. Contacts 3. Validate the Market 4. Presence of distributors 5. Establish relationship ...

Ready Accessibility: Investigate

2°C Cloudy

Search

ENG US

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Planning documents and checklist - Excel

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A1 8. KEY DISTRIBUTOR CRITERIA AND RELATED QUESTIONS

8. KEY DISTRIBUTOR CRITERIA AND RELATED QUESTIONS

ID #	KEY THEME	REQUIRED CRITERIA	RELATED QUESTIONS
PRIMARY DISTRIBUTOR CRITERIA AND RELATED QUESTIONS			
I.	Affiliations	<ul style="list-style-type: none"> Should not be based in or affiliated with countries known as foreign interferers in Canadian national security and intelligence Strong recognition of intellectual property rights 	1. What countries does the entity operate in? 2. How does it protect IP of current clients?
II.	Contractual Arrangements	<ul style="list-style-type: none"> Must pay invoices on net terms (e.g. within agreed timeframes) Must not operate on a consignment model 	1. Will you engage in a contractual (not consignment-based) relationship? 2. Do you act on consignment for your other suppliers? 3. What is the duration of your contracts (on average)?
III.	Network Size	<ul style="list-style-type: none"> Must have adequate number of re-sellers and capacity 	1. Where are you based? Other centres of operation? 2. What geographic area do you service now? i. Plans to expand? / Still growing? ii. Experience developing future markets 3. How many branch offices do you have? Where are they located? 4. How many warehouses do you have? Where are they located? 5. Do you have capacity for our product? Would you need to expand? 6. Do you have partnerships with other distributors?
			1. How many product lines do you represent? 2. Do you offer other hardware products that compete with SCUTE? Is there any conflict? 3. Would you be willing to alter your product mix to accommodate SCUTE?

6. Evaluate distributors 7. Recommended distributors 8. Key Criteria 9. Trade Shows 10. CBIO

Ready Accessibility: Investigate

2°C Cloudy

Search

ENG US

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Part of an outsource partner selection information collection plan in Vietnam

Criteria Name	Criteria Type	Phase
Does the company source components from China? Have customers from China?	Supply Chain	Secondary Assessment - Primary Research
Is the company's defect rate under 0.1%?	Quality	Secondary Assessment - Primary Research
Certifications: ROHS, FCC, CE, PSE, SIRIM.... (EU, USA, Japan, Malaysia)	Certification	Preliminary Assessment - Web research
Do they sell or supply to Japan?	Organizational	preliminary Assessment - Web research
Is the company able to fulfill a minimum SKU order of 120 units?	Supply Chain	Tertiary Assessment - Expert and/or Company Interview
Number of cats seen on plant floor	Quality	Final Assessment - On-site meeting
Can the company commit to a delivery lead time of between 45-75 days, with consistently little variance in lead time?	Supply Chain	Final Assessment - On-site meeting
Does the company manufacture their products for other companies who sell in North-America? (in particular competitors)	Organizational	Final Assessment - On-site meeting
Is the company open, honest and transparent in their dealings?	Organizational	Final Assessment - On-site meeting

Insight needed to choose an appropriate outsource partner

Criteria (information needs) Phase (timing and broadly info source)

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Selecting an outsource partner in Vietnam — Spot the cats



<https://www.iaasiaonline.com/how-the-iiot-is-transforming-plant-floor-management/>

Selecting a partner/distributor in Malaysia: What's in the office and where? From Snoop by Gosling



<https://www.businessinsider.com/desks-of-famous-people-2013-1>

Channel Partner Selection Assessment

Selection Criteria (see Annex B)	Concrete Suppliers	Engineering Firms	Construction Firms – Tier 1 (large scale and vertically integrated)	Construction Firms – Tier 2 / 3 (small scale, independent services)
Degree of Influence	Low	High	High	High
Technology Adoption	Low	High	High	Low to medium
Access to Project	Medium	Low	High	Medium
Technical Integration	Low	Medium	High	Low to medium
Market Consolidation	High	Low	Medium	High
Ease of Partnership	Low	Low	High	Low to medium
Duration to Market Entry	Not applicable	Long term	Short to mid term	Mid to long term

Table 7 - Channel Partner Selection Assessment

TABLE 1: DECISIONING CRITERIA FOR CONDUCTING BUSINESS IN MALAYSIA

CRITERIA	OPTIONS FOR SEARIDGE		
	REMAIN WITH AAT	PURSUE ALTERNATIVE LOCAL AGENT	ESTABLISH LOCAL ENTITY TO SELF REPRESENT
Historic Relationship with CAAM	5	3	0
Current Relationship with CAAM	3.5	3.5	0
Availability of Resources for Satisfy Current Opportunity	5	1	0
Ability to Satisfy Full Cycle Requirements of Current Opportunity	5	Unknown but likely 2.5-3.5	1
Current Market Share	3	1	0
Capital Investment Required	5	Unknown but likely 2.5	1
Decision Freedom	Unknown	Unknown	5
TOTAL	26.5	14.5	7
RANK	1	2	3

Driving Forces Matrix

Force	Strength	Ability to Influence	Score
Broadcasting			
Availability of multiple channels	1	1	2
Requirements for multi-channel delivery	2	1	3
Government desire for digital transition	5	1	6
Growth in streaming services	4	3	7
Cell			
Aging/Suboptimal infrastructure	4	4	8
Potential for new entrants and disruptors	5	4	9
High penetration but low growth potential	3	2	5
Market consolidation	4	5	9
Government desire for digital transition	5	2	7
<i>Strength: 1 Weak – 5 Strong Ability to influence: 1 – Low – 5 High Score: Sum of two</i>			

Contact management form

Contact Name, Position and Org	Friendly of the group, client or program	Method of contact and contact information	Commonality (can network with)	Expert that likes to share/talk	Status of the engagement
Kimothy Walker	Friendly of the group	Telephone – 613-859-3753	Yes	Yes	MB – Initial outreach January 22 Provided in market contacts January 26
Tran Thai Ha	No	Email –	Yes		MB – Initial

Criteria Name	Priority	YLI	Validated By/Independently Verified?	Score
Is the company at least medium in size (100-500 empl)?	Optional	Yes	Yes (competitors)	0.5
Is the company NOT headquartered in China?	Critical	Yes	Yes	1
How dependent is the company on China?	Optional	Supply chain	No	0.5
Is the company NOT supplying any similar products to the North American Market	Critical	Yes	Yes (competitors, Zary research)	1
Do they sell or supply to Japan?	Optional	No		0
ROHS directive (EU) compliance	Critical	Yes	On packaging	1
FCC certification	Critical	Yes	Yes	1
Energy Star certification for USA	Optional	No	Yes	0.0
CE Certification for European Union	Optional	Yes	Yes	0.5
PSE certification for Japan	Optional	No	no	0
SIRIM certification for Malaysia	Optional	Yes	Yes	0.5
Does the company manufacture value added products that NDR could add to their line?	Optional	Yes	Yes, 2x4 boards	0.5
Does the company have latest technology capabilities/knowledge (Connected home, IoT, Blue Tooth Mesh)	Optional	Yes	Bluetooth	0.5
Is the company vertically integrated (capable of manufacturing all components or do they outsource some components)?	Optional	Yes	Integrated from raw materials to packaging	0.5
Does the company source components from China?	Optional	Yes	Confirmed by staff	0
Is the company's defect rate under 0.1%?	Critical	Unknown	Yes, ISO9001	1
Is the company capable of producing at least 100,000 units/month?	Optional	Yes	Yes, we saw this	0.5
Does the Company have an English-speaking management level employee?	Critical	Yes	Confirmed	1
Do the company's products meet LM-80 standards for the performance of their LED light source over time?	Critical	Yes	Yes, on demand	1
Do the company's products meet LM-79 standards?	Critical	Yes	On demand	1
Do the company's products meet TM-21 standards?	Optional	Unknown	unknown	0
Is the company able to produce products that meet CSA standards?	Critical	Unknown	unknown	0
Does the company have established quality standards for packaging?	Critical	Yes	In-house. Saw this	1


Category	Category Rating	Criteria	Criteria Rating
Country	Green	Political Status ★	Green
		Social Status	Green
		Economic Status	Green
		Ease of Doing Business	Yellow
		Proximity to Current Searidge Operations	Green
Aviation Sector	Green	ATC Operating Environment Open to Foreign Investment?	Green
		Signs of ATM Technology Market Validation ★	Green
		ANSP Recognition of Accreditation	Green
		Air Travel Rate of Growth (Passengers and Cargo)	Green
		Airport Operations - Demand vs Capacity	Green
		ATM Technology Investment	Green
		ATC Supply vs Demand	Green
		Major/Minor Airport Composition	Green
		Aviation Infrastructure Investment Rate (New/Upgrade/Expansion)	Green
Stakeholders	Green	Partnership Availability ★	Green
		Degree of Competitor Market Presence	Green
		Material / Equipment Availability	Green
		Command of English Language	Yellow
		ATM Tech Talent	Green
Company Strategy Alignment	Green	Degree of Innovative Culture	Green
		Goals Alignment ★	Green
		PMF Alignment ★	Green
		VP Alignment ★	Green
		CA Alignment	Green

Figure 2 – Vietnam Country Assessment Matrix Results

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This is all about – the beginning of the intelligence process and focus

- What decision are we helping the organization make?
- What information do we need to make an appropriate recommendation?
- Where will we get each of these pieces of information from?
- How will we collect the information?



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)

Don't get hung up on the structure of the forms – they are just generic ideas. The forms work whether its intelligence, foresight or market research



Technology entrepreneur

- **Google searching/ secondary information (they did this)**
 - Competitors web pages what are their products? Their strengths and weaknesses
 - Review articles about the products on the market
 - Look at potential customer comments on social media
- **Analysis (they did this)**
 - Projection from stats data, social media analysis
- **Market research (they did this)**
 - Surveyed potential customers on what they want
- **Future proofing – Add to this, a mix of foresight and intelligence techniques.**
 - **Temporal:** Need to do a variety of scenarios as it will be 5 years from idea to commercialization. Another 5 for breakeven. Maybe backcast?
 - **Focus:** Why will customers think it is disruptive –is this the better mousetrap, the faster horse? (customer insight); what will competitors be working on during this time? Where will the “puck be” in five years when this comes out?



Next few classes

- Brief about the insight logs
- Wrap up of planning (forms B C and D)
- Analysis – Market assessment, profiling and more
- Organizing for CI
- Course wrap up

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Insight logs – quick feedback/Advice

- READ THE ASSIGNMENT INSTRUCTIONS IN DETAIL
- One document (25% were zip files)
- Readings (this will be even more evident this week and next week).
- Ahas-Insight vs summary (AI will not help you here)
- From the professors vs classmates vs the readings

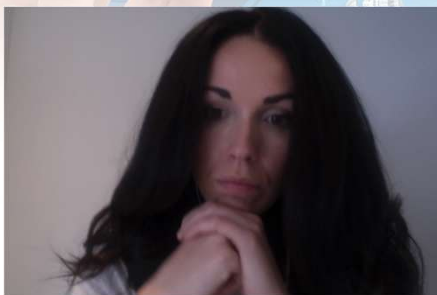
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Best Foods form A have looked like (Keep in mind it was an incredible success)

1 Description of the insight topic including what insights the decision maker is trying to develop.	How will the 2 competitors react to my 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	Product launch strategy details
4 Hypothesis – If you had to guess know what you think your conclusions would be on #1	Competitor 1 will drop prices immediately Competitor 2 will do nothing
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 within three months of product launch

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Clear Risk – Customer intelligence



Before



After

Back to Clear Risk – this is 2 KITS 1) Identify top prospects and 2) Profile each prospect

What would Clear Risks form A 2 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.	Customer profile to identify communication preference
2 How forward looking do you have to be	1 year (sales cycle)
3 The decision/action that would be taken with the insight	Customized content
4 Hypothesis – If you had to guess know what you think your conclusions would be on #1	**different for each company you are profiling
5 Who is the decision maker	Kate – from clear risk
6 For the decision that is being made (#3) how does the organization determine that the decision was successful How does the decision maker measure success, what is their desired outcome from the decision for which the form A is being developed	Becomes a sales opportunity

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Form B – Information needs and sources

Information need	Primary sources (people: Inside and external)	Secondary sources ("things" inside and external)	Ideas on where you will find it, how to collect it

Compare each line in form B to Form A line 1. Ask is it needed?

Guess at all pieces, is it enough to confirm/reject hypothesis and make decision (again Form A)

Check temporal orientation of each line against Form A

- Can it be validated?
- Is it the right number of pieces? Not too many or too few?
- Is it realistic? Does it exist?
- Do I have enough resources to get it?
- Am I being specific enough? Would my network understand?
- Is it what the decision-maker needs to make the decision?
- Is it what we need for the analytical technique/model chosen?
- Is it legal/ethical to go after this information?

Where do we get Information needs from

- Discuss as broadly as possible
- Check with subject experts
- Check with country experts
- Check with academics
- Check with friendlies
- Think analysis/assessment** Next two classes
- Strategy factors
- What about management preferences?

Identifying information sources from Brad Ashton

Companies

- Publications
- Product Brochures
- Annual Reports
- Press Releases
- Conference Exhibits
- Help-Wanted Ads

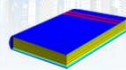
Academia

- Literature/ Publications/ Proceedings
- University Programs (with corporate sponsorship)
- Case Studies

Federal

- Patent & Trademark Office
- S&T Departments & Agencies
- Freedom of Information Act (FOIA)
- Securities & Exchange Commission
- International Trade Administration
- Court Cases

SECONDARY SOURCES



Library (Corporate and others)

- Periodicals
- Patents
- Trade/ Financial Publications
- News
- Directories
- Data Bases
- Electronic Search/ Clipping Services
- Market/ Industry Reports
- Internal Memos & Trip Reports

State/Local

- Economic Development, Zoning, Planning Office
- Uniform Commercial Code (UCC) Filings
- Chamber of Commerce

PRIMARY HUMAN SOURCES

Internal

- R&D/Technology Staff
- Sales Force
- Purchasing/Procurement
- Regulatory/ Legal
- Manufacturing
- Senior Management

External

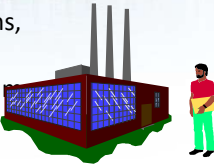
- Customers
- Suppliers/ Vendors
- Trade Associations
- Trade Shows, Conferences, Seminars
- Consultants, Industry/ Academic
- Financial/Securities Analysts
- Executive Recruiters
- Journalists
- Special Interest Groups

From Brad Ashton: Sources and methods

TECHNICAL SOURCES

Field observation (first hand)

- Visits, inspections, tours
- Personnel assignment
- Listening posts



Remote or local sensing

- Satellite imagery
 - optical
 - IR
 - radar
- Chemical emissions recording
- Environmental sampling



Specialized data/ communication systems

- Internet
- Social Media
- Intranet/ groupware tools
- Company databases
- Expert databases



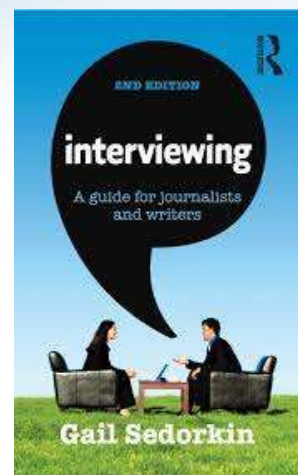
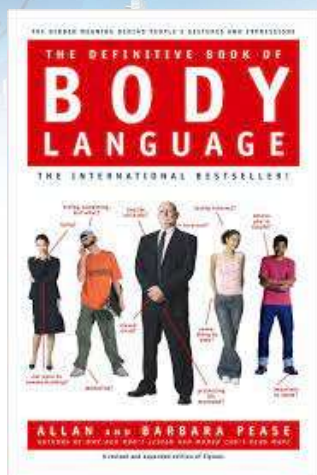
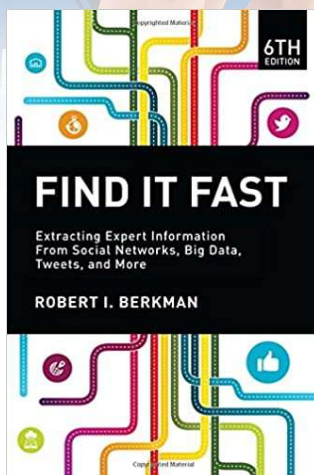
Reverse engineering

- Equipment breakdown



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There are tricks and traps for each method



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Information sources – creativity involved

- Think about where would the information be directly stored? (Secondary)
- Who would the information be known by? (primary)
- Is there a way to observe it? Measure it?
- Are there indirect indicators?

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From the book – Creative approaches

Is the topic relevant to my information needs

AI and Analytics for Autonomous and Robotic Systems

25 Feb 2019, 11:45 - 13:15 Conference Room 1

This session will focus on the application of AI and analytics in optimizing effectiveness of autonomous and robotic systems, with presentations on 3D visualization and models, integration of satellite communications to optimize situational awareness of autonomous systems, and the development of appropriate software systems to manage operations, effectively.

Chaired by:

Dana Manalang, Senior Systems Engineer, University of Washington

Are the presentations relevant to my info needs

Operational time and cost efficiency for Inspection and Survey Projects using a unique Photogrammetric Integrated System to reconstruct accurate 3D models of all Subsea Structures

Bertrand Chemisky, Innovation and Marine Department Manager, COMEX SA

Over the Horizon Unmanned Survey Capabilities, How Far Away Are they?

Richard Mills, Director of Sales for Marine Robotics, Kongsberg Maritime

How remote Robotics will transform Offshore Energy and Aquaculture

Donald Pickering, CEO, Ollis Robotics

Streamlining the Workflow from Target Detection to Reacquisition with AUVs to autonomy-aided ROVs

Jeffrey Snyder, Field Operations Supervisor, L3 OceanServer

Are any of the speakers people that I need to talk to for my information needs? I know where they will be !!!!

Are there going to be people at the session that I want to talk to? Whose questions I want to hear?

2

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Form B – Clear Risk Kit 1 : Identify high priority companies

Information need	Primary sources (people: Inside and external)	Secondary sources ("things" inside and external)	Ideas on where you will find it, how to collect it

Form B – Clear Risk Kit 2 : Profile them to develop appropriate communications

Information need	Primary sources (people: Inside and external)	Secondary sources ("things" inside and external)	Ideas on where you will find it, how to collect it

Form C Planning – Project Work Plan by Brad Ashton

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Think:
Sequencing

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Form D – Collection forms

- Interview scripts
- Observation forms/protocol's
- Search statements
- Body language/interview capture forms

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Booth Information Capture Form

Company Name _____

Product(s) _____

Location _____

Country of company _____

Branding Table

Country of Branding			
Country of origin	None	US	Other _____
US			
Other _____			

Comments regarding branding (does it say country of, colors used, etc. how prominent) - multiple products

Trend indicators:

Observation protocol.

Every 5th booth to be assessed (for statistical purposes)

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Form D: Search statement form

Information needs being searched for	Search engine being used	Search statement being used	Results

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Form D: AI Prompts – full analysis is possible

Information needs being searched for	AI system being used	Prompts	Results

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Form D: Health food stores in Toronto

Questions	How to gather/Source	Yes	No	Notes	Info need
Do they carry other natural products like ours	Observe (on the shelves)				What are competitors doing in Toronto
What competitors do they carry	Observe (on the shelves)				What are competitors doing in Toronto
Who distributes this to the store	Observe (it will be on the labeling) and ask the manager/owner about this				Which distributors appear to have access and are working in this market
What are the range requirements for product?	Interview with manager/owner about this				What does the store/customer need to adopt a new product
What are the pricing requirements?	Interview with manager/owner about this				What does the store/customer need to adopt a new product
Are they open to buying direct?	Interview with manager about this				Is the store/customer willing to adopt a new product directly

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Another project

Words: Statements made by the client or the potential customer: text analysis	Body language: What is their (potential customer) reaction	Assessment

Words: Statements made by us or them (list for content analysis)	Body language: What is their reaction to the words in column 1	Suggested meaning/your interpretation
Us: We pitched to them (secure storage, fast access)	Arms went cross. Intense stare. Tone got louder	
Them: But, can you transmit data into the system from a remote location? Mountain top?		
Us: You can store all your TV video on this one unit	Looked out the window .	
Them: How secure is the remote transmission and how fast can it be done?	On our response (secure and fast) pupil dilation, leaned forward	
Us: It's being used by top networks in the USA	Looked at the ceiling then down at floor. Feet facing the door	

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What did the group do

- Took the sales team aside that night
- Debriefed them on what the text analysis and body analysis were saying.
- Asked what kind of R&D needs to be done to make this fast secured transmission in remote areas (because....)
- Answer was none needed – the product does that but that's not how we sell it.
- Sales changed the pitch – sales made
- The “true” competitive advantage and valued differentiation

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Analysis form D's – you will see theses in the next class

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