COOPERATIVE INTELLIGENCE RELATIONSHIP BUILDING, PART 2

ELLEN NAYLOR, *Business Intelligence Source*

"Together we are always able to accomplish what none of us could achieve alone."

Dan Zadra

In my introductory article on cooperative intelligence in the January/February issue, I included a sidebar listing "Cooperative Intelligence Practices and Attitudes" as follows:

1. Treat your clients with respect.
2. Take a problem-solving attitude, but don't solve their problems.
3. Identify the currencies of exchange with your contacts.
4. Be a source for acknowledgment and appreciation.
5. Maintain a positive attitude.
6. Don't take yourself too seriously.
7. Promote continual communication.

In the May/June issue, I explored the first three items. In this issue, I will cover the fourth and seventh ones.

BE A SOURCE FOR ACKNOWLEDGMENT AND APPRECIATION

"Appreciation can make a day, even change a life. Your willingness to put it into words is all that is necessary."
Margaret Cousins

In today's race to accomplish too much with too little, people often forget to thank other people for a job well done. We just move on to the next fire drill. Acknowledgment is all the more appreciated as the notion that someone slowed down enough to take notice. Acknowledgment and recognition are two of the most rewarding attitudes you can share and, next to money, these are major incentives for people to excel at work.

There are few things that we can do that are as simple, yet powerful, as providing meaningful acknowledgment and appreciation. When you're acknowledged for a project well done, you feel happier and most energetic and positive, and are more likely to repeat the behavior that generated the acknowledgment.

Most competitive intelligence professionals thank outsiders for competitor tips, unless they have contracted for their services. However, it is often tempting to take your internal company sources of competitive intelligence for granted, assuming that it should be part of their job.

Since many competitive intelligence professionals don't have people reporting to them, it is all the more important to express appreciation for the competitive data received from individuals, to encourage them to continue providing you with information. Give your clients and those who send you hot competitive tips timely, positive feedback when appropriate. Tell them how much value you found in what they provided, and how it specifically helped your analysis.

Find a meaningful way to thank people who have helped you. In sales, money is really not that useful, since you can't compete with the amount they can make in commissions. In most company disciplines, people respond well to recognition, sometimes even more than to money. But you need to be sensitive to individual needs, since some people may not appreciate broadcast recognition in a public venue such as the company intranet. These individuals may prefer some form of one-on-one attention.

When I was a competitive intelligence practitioner, sales folks often provided me with valuable competitive data, such as new product announcements and product descriptions. This information was valuable not only to me but also to our product development personnel. I would write a letter of appreciation to the person and copy it to the sales manager, sometimes even the sales vice president. If you have a company magazine, intranet, RSS, or blog, use them to appropriately broadcast your thank-yous, especially to people in sales. Let people know what you were able to do as a result of what they shared. If there were multiple beneficiaries from their lead, let them know that too.

One person I interviewed in the biotech industry said his company tracked the specific form of recognition each person in his division valued and stored this information on the company intranet.

PROMOTE CONTINUAL COMMUNICATION

"The road to success is always under construction." — Lily Tomlin.
(So is the road to communication!)

Communication is a 24/7 phenomenon is today's world. With all the choices of ways to communicate — phone, e-mail, RSS, blog, and in person — it is all the more important to recognize which form of communication is the best for your competitive intelligence deliverables. Part of a good competitive intelligence audit is to ask users how they would like to be communicated with and how they would like to communicate with

the CI team.

Communicate to be understood

Know your audience. Find out how they like to be communicated with, whether by e-mail, phone call, PowerPoint, or memo. It's a sign of respect. I have found that most executives want competitive intelligence that is event triggered, not calendar driven like a newsletter. This is probably also true for most employees, since we receive more newsletters via e-mail than we have time to read.

Because of the proliferation of communication, you need to provide timely data or valuable analysis within each CI deliverable. Don't let your e-mail report be a victim of the Delete button. Provide quality analysis that is insightful, based on events that change the competitive landscape.

Speak straight

Be direct, clear, and honest in your communication. When you have something difficult to share (which is often the case in competitive intelligence), acknowledge the discomfort or awkwardness your news and analysis might cause. Doing so helps the other person listen to and accept your message.

For example, in competitive intelligence, we often have to tell people who think they have a novel idea that five other companies are already marketing this product or service. Deal with this delicately, but don't cloak the finding.

The quality of your answers is directly related to the quality of your questions

What do you need to know about your client's business problems to select a good approach and create a solution? We're often in too much of a hurry or we're too eager to please, so we don't stand back and ask the thoughtful questions that will save everyone time and aggravation.

Competitive intelligence is often misunderstood. Many of our clients don't really comprehend what we do and make inappropriate project requests or impose unreasonable deadlines. They often hope that we can help solve their general business problems. This makes the role of asking questions even more important.

Give your clients a stake in the outcome by making sure they participate in the process

If clients are not involved in developing the process, they are not likely to embrace the final product. For example, conducting a win/loss analysis often starts with gaining approval for the process at the sales manager level. But it is also critical to get the account manager to buy in, since you're interviewing her client and possibly infringing on a relationship she feels she owns.

One of my customers did not clearly explain to sales that I was hired to conduct win/loss analysis interviews. Marketing targeted certain accounts for a win/loss interview, but neglected to inform the account managers that I would be calling. I had to explain who I was, why the company was conducting a win/loss analysis, and who had approved it, as well as answering all their questions about the process. This was not a successful win/loss analysis process, since the company did not clearly communicate or get buy-in from sales, and I had to spend a long time explaining this.

When product managers ask for support, encourage them to tell you about the product in detail and describe their vision of where it is going. When I was a competitive intelligence practitioner in a large corporation, our company hired recent college graduates as product managers. They did not have practical working experience with their products, so they wanted me to help define the product or service. I prepared a form to get them thinking about what was needed for effective competitive intelligence (see sidebar). In the process of filling out this form, the product manager explained the product to me in detail, including forecasts, competitors, and so on.

Another reason I had requestors fill out a form, especially in product development, was that I needed to understand the fine points of our company's products, and without the proper explanation, I could not be as helpful. Discussions with product managers and developers often started with their assumption that I had a complete understanding of all our products and where we were headed with them. Depending on your relationship with your client, you may want to fill out such a form yourself, either at a meeting or over the telephone.

You must clearly understand what your competitive intelligence clients need and how they will use your work before you start the CI process, since it helps to set the boundaries of your effort. If clients aren't willing to take the time to thoroughly explain their situation and needs for competitive intelligence, I would place a lower priority on their project. Responsibility sharing should be part of your competitive intelligence process right from the beginning of your working relationship.

In today's rushed work world, people may ask for our help in competitive intelligence without investing the time to telephone us, preferring to communicate their request via e-mail. This doesn't work. At the very least, you need to schedule a conference call to invite requestors to participate and engage them in the process, If you don't understand what people want and they don't want to invest the time, you just have to tell them no.

One corporate practitioner responds to clients who won't tell him what they really need by saying, "We need more detail about your request. Without the proper context, we cannot prioritize your project." Another competitive intelligence practitioner asks, "What will you do differently with this data or analysis?" In both cases, the

competitive intelligence professionals are qualifying their CI projects.

Set and ask for expectations

We judge situations not only by what happened, but by how it compares to what we had expected to happen. Create mutually understood expectations in every situation. Define the following areas:

- Time frames: yours and your requestor's
- Communication process: how often and to whom
- Deliverables: what, how, and to whom
- Metrics: how you will know you are successful in meeting the requestor's needs

Expectations often change during the course of longer project, so it's a good idea to get them in writing at the outset, so everyone is clear about the process, time frames, and deliverables. Including metrics can help build your case for return on investment in competitive intelligence delivery. We are asked to provide quantitative benefits for the sustainability of competitive intelligence funding. It is very simple to collect both qualitative and quantitative benefits if this is specified at the outset of a project.

A qualitative benefit often cited by executives is that competitive insight gives them confidence to make better strategic decisions. Quantitative benefits may include sales won, successful product launches, revenue saved by not entering a losing marketplace, and revenue saved by introducing a product before a competitor as a result of early warning from the competitive intelligence team. If you collect metrics for your major projects, you can more easily provide an annual competitive intelligence benefit statement.

Take responsibility: don't be a victim

Ask for what you need rather than waiting to be given what you need.

Describe how you want to be treated rather than complaining that you're not being respected. Let your competitive intelligence clients know that you need "x" amount of time to turn a project around. If their request is not reasonable, tell them right away, and tell them why. And let them know what is reasonable.

Follow up on everything

Don't keep your clients guessing as to your progress on projects. People count on us for actionable intelligence results, not effort. If you're a supervisor, make sure your people are delivering on time and that the quality remains good, whether from company employees or consultants.

Get ready for a surprise in my next column, where I will not be sharing anything more on cooperative intelligence practices and attitudes. Stay tuned.

[Author Note: This article builds off a number of practices from Larry Friedman's "Fundamentals" that he has developed in his wisdom over the years for his employees at Reimbursement Services, Inc. Larry is VP for culture and learning at Reimbursement Services, Inc., in Mt. Laurel, New Jersey.]

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