

Managing Competitive and Market Intelligence for Business Success

A 2-day Practical Workshop to Guide the CMI Function for Business Success in a Changing and Challenging Marketplace



September 23-24, 2019  Shanghai China



Performing competitive and market intelligence (CMI) requires effective application of art (actions, choices, decisions, planning and strategy driven by intelligence outputs), science (analytical methods and techniques) and craft (learning from experiences of performing and managing CI). High performing CMI programs and performance are one of the foundations on which business actions are developed, scrutinized, and changed over time. In this two-day workshop, we will focus on how to combine the art, science and craft of managing the CMI function effectively to contribute to ongoing business success.

Workshop Facilitator



Dr. Craig Fleisher

- One of the most decorated CMI experts globally
- Chief Learning Officer (CLO) at Aurora WDC
- Former President of Strategic and Competitive Intelligence Professionals (SCIP)

Craig has over 30 years experience in strategic and competitive intelligence. He focuses on how to enhance and lead insight-related activities; developing innovative, strategic sense-making/-giving capabilities, culture & processes in organizations that result in superior data/info analysis, actionable decisions & market success.

He has consulted with some of the globe's most respected brands including among others, 3M, Bell Canada, BHP Billiton, CIBC, EDS, ExxonMobil, GE, GM, Imperial Oil, IBM, J&J, Lennar, Levi Strauss, Merck, Noranda, Novo Nordisk, P&G, Telstra, and TD Bank.

Learning Objectives:

At the end of the course, active learners should competently demonstrate increased:

- **Capacity** to think strategically, including anticipating and winning business battles before they happen by outmaneuvering unfriendly forces in the marketplace.
- **Knowledge**, in the form of a set of concepts of intelligence functions: the what's and how's of conducting CMI activities in a strategic manner, and knowing which tactical and operational activities can add the most value.
- **Skills**, particularly in conducting intelligence research, analysis, developing & evaluating options, making recommendations, and assessing the implementation of strategies.
- **Perception** of the "big competitive picture," seeing your organization in its totality, not as isolated parts; appreciating the parts in the context of the whole.
- **Awareness** of ethics and social responsibility as key ingredients in conducting intelligence activities.
- **Capacity** to integrate the knowledge gained in prior courses and your experience to-date.
- **Confidence** in your ability to present ideas in a logical, persuasive manner.

Specific "Take-Aways"

- ▶ Communicate the process underlying competitive and market intelligence in modern global organizations
- ▶ Gainfully employ several strategic, competitive and business analysis methods (i.e., dynamic industry analysis, competitive positioning analysis, customer segmentation, customer value analysis) in order to understand current and future situations as well as potential strategic opportunities or threats
- ▶ Describe the categories of analysis tools & techniques, understanding the basic focus of each
- ▶ Make use of dynamic analysis in order to understand competitive, industry and market structures as well as potential responses to opportunities and threats
- ▶ Understand the use and roles of information systems or processes in supporting the CMI process, examine leading practices being used by leaders in this area through case studies
- ▶ Identify the fundamentals that affect analytical thinking and performance
- ▶ Employ an internal needs identification process, recognize the importance of building an internal brand and demand for their services, and understand the role of an analytic calendar
- ▶ Recognize the value of and create helpful Key Intelligence Topics (KITs), and understand how these can be linked to scores of analytical methods
- ▶ Assess the advantages and disadvantages of applying unique analysis methods
- ▶ Effectively utilize several unique business and competitive analysis tools



Outline Day One | September 23, 2019

Module 1:

Foundations for Managing Competitive and Market Intelligence (CMI)

- Review and identify the foundations, definitions of CMI
- Compare and contrast what CMI is and is not
- Establish a common frame of reference among participants about CMI
- Describe the process used to generate CMI
- Identify the competencies which underlie top CMI professionals and functional practice
- Explain the place of CMI in the company's larger strategy process
- Discuss how CMI is evolving to meet decision maker's needs in a changing, challenging market place
- Conclusion, Q&A

Module 2:

Defining the Intelligence Problem and Planning the CMI Effort

- Achieving success with C-suite level executives
- Understand the critical factors as to how CMI efforts are planned
- Discuss and learn about the process of determining client's needs and apply these to your context
- Explore the role of KITs in CMI planning
- Focus on different ways to understand and taxonomize our competitors
- Learn how to create and the benefit that come from applying an analytic calendar
- Learn from a practitioner by using a case study about an individual who applied the techniques we've covered
- Summarize and answer your questions about CMI planning and problem definition

Module 3:

Opening Up the CMI Analytical Tool Kit and Thinking like An Analyst

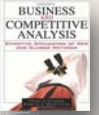
- Elucidate what is meant and not meant by intelligence analysis
- Identify forces that are changing the nature of intelligence analysis as practiced today
- Explain how KITs can be used to help support the analysis and insight development process
- Summarize the KITs+1 approach Aurora developed that links KITs and analysis methods
- Describe several other considerations that arise in choosing what analytical tools to use
- Summarize the module and answer questions

Module AT.1 (Analytic Training):

Working with Useful Competitive Analytical Tools

These tools are representative of ones from Craig's newest methods handbook entitled Business and Competitive Analysis. These two are "actionable" adaptations of the two most commonly used CMI analysis methods.

- Industry Fusion Analysis
- A Better SWOT Analysis



Outline Day Two | September 24, 2019

Module 4:

Developing or Re-Developing the CMI Products/Services Portfolio

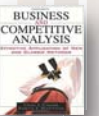
- Audit the existing products/services delivered by your function
- Determine the value generated by each product/service
- Identify the costs needed to develop major products/services
- Develop a process to annually review deliverables
- We'll summarize the key concepts of the module and answer your questions

Module AT.2 (Analytic Training):

Applying Useful Analytic Tools and Techniques

These tools are representative of ones from Craig's newest methods handbook entitled Business and Competitive Analysis. These two are "actionable" adaptations of the two most commonly used CMI analysis methods.

- Business Model Analysis
- Competitive Positioning



Module 6:

Developing Effective HUMINT Capabilities

HUMINT is the gathering of data and information through human contact and interaction, and one of the "classic" (though often untaught) means by which CI practitioners do their research.

- Describe various models of elicitation
- Assess elicitation capabilities and skills of current team members
- Identify areas for HUMINT improvement
- Practice with tailored methods of elicitation
- Summarize and answer your questions about what to examine next about HUMINT capabilities



Module 7

Demonstrated Practices in CMI, CM Analytics and Wrap-up

- Elaborate on the goals of your CMI deliverables.
- Selecting the appropriate deliverable format.
- Identify the success characteristics to delivering key deliverables.
- Describe the importance of branding your deliverables.
- Discuss the importance of conducting the follow up and the deliverables checklist.
- Address the best practice standards of gold medal CMI.
- Participate in Q&A and summary

Daily Schedule

- 08: 30 Registration
- 09: 00 Morning Session Starts
- 10: 30 Coffee Break (15 minutes)
- 12: 30 Lunch
- 13: 30 Afternoon Session Starts
- 15: 00 Coffee Break (15 minutes)
- 17: 00 Workshop Ends



Who Should Attend

- Competitive Intelligence
- Marketing Intelligence
- Business Intelligence
- Marketing
- Market Research
- Commercial Development
- Business Development
- Strategic Planning
- Product Management
- Product Development
- Pricing
- Business Analysis



Registration Fee

Standard Fee: RMB 10800

The fee includes VAT and training materials, lunch, refreshments and certificate



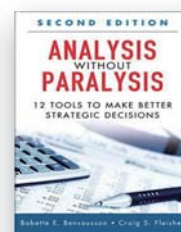
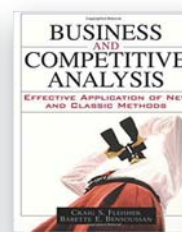
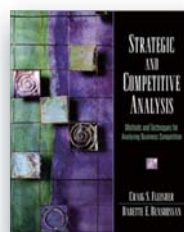
Facilitator's Profile

Dr. Fleisher is the Chief Learning Officer (CLO) @Aurora WDC (Madison, WI), one of the globe's leading intelligence-focused professional service firms. For 30+ years in boardrooms and classrooms, his innovative ideas, methods, and principles are regularly presented, published and validated in dialogues & analyses with accomplished executives. A Council of CI Fellow and SCIP Meritorious Award winner, Craig is among the globe's top-cited Google Scholars and thought leaders in several business and communication subjects.

He speaks with and has been quoted in prominent international media and advised scores of associations, government/public agencies, and think tanks. He has consulted with some of the globe's most respected brands including among others, 3M, Bell Canada, BHP Billiton, CIBC, EDS, ExxonMobil, GE, GM, Imperial Oil, IBM, J&J, Lennar, Levi Strauss, Merck, Noranda, Novo Nordisk, P&G, Telstra, and TD Bank.

A prolific author/editor of 14 published books (a handful of which are translated into Mandarin) and over 150 scholarly papers or chapters, his bookshave been used in MBA and post-graduate courses at top 10 caliber global business schools such as Chicago, Cornell, Harvard, London, MIT, NYU, Toronto, Tsinghua, and Wharton.

Dr. Fleisher is a former President & board member of SCIP, Chair & board member of a national Foundation (Washington, DC), President of a public affairs association (Toronto, ON), editor of a scholarly journal, author and co-editor of intl. Handbooks in Corporate and Public Affairs. A former 2x endowed university research chair holder, business school dean and Professor, he is/was a member of university faculties and/or advisory boards in AU, CA, CH, FI, NZ, UK, US & ZA. Craig is a Meritorious Award winner and Fellow in strategy and competitive intelligence, and has received numerous honors for his teaching, research, mentoring and service. Craig is a frequent visitor to China and has been involved in CMI instruction at various business schools and executive education organizations there since 1998.



Top-selling books authored by Dr. Craig Fleisher

