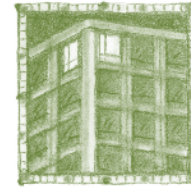


## REFINING INTELLIGENCE REQUESTS

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Sometimes the most effective intelligence analysts are not those with the most sophisticated tools at their disposal but instead those who answer the right question from the onset and have the skills to redirect or refine intelligence requests when necessary.

Clarifying and in some cases restating the Key Intelligence Questions (KIQs) that underlie an intelligence request is the critical first step, too often skipped during the planning process.

### QUESTION THE QUESTIONS

Starting off by identifying the right KIQs associated with the intelligence request saves an analyst considerable time and eliminates reworking the project in the future. Few analysts would disagree with this statement because it appears so obvious. In practice, it rarely is a routine part of the project approval process.

As competitive intelligence analysts, we already know how to identify whether or not a project fits the definition of our key intelligence topics (KIT): a KIT supports a business need and can provide actionable intelligence. Most of us have learned early on that competitive intelligence deliverables that meet the key intelligence topic definition are the ones which actively deliver value by contributing to strategy development and decision-making.

Very often we end our line of questioning once the project meets the key intelligence topic criteria and we move forward with the intelligence request. We don't take the additional step of challenging whether the right key intelligence *questions* are being asked and if they support a business need or problem. Determining if the right questions are being asked requires an analyst to have a genuine understanding of the issues.

### UNDERSTAND THE CONTEXT

Initially, it takes time to understand an issue, and to do so usually requires you to conduct a face-to-face meeting with your internal customer where you discuss the nature of their request with them. This generates an understanding of what is prompting the need, how the customer intends to use the intelligence, and what next steps are likely to ensue.

Obtaining a full picture of the issue and other contextual concerns surrounding a request allows you to develop more targeted research and more relevant analysis

based on the important nuances, precursor conditions, and corporate agenda you identify. When competitive intelligence analysts do not take the time to question internal customers about the rationale for their request, they risk delivering an intelligence assessment that is not decision-relevant and is not well received by their internal clients. Not only does this generate a poor

project outcome, but it also has direct impact on how the entire competitive intelligence function – and the value it delivers – is perceived by senior managers within the organization.

Developing a high level of understanding about the project's context through direct personal interaction with your client not only helps you fully grasp all the nuances of the project, but also helps you build a collaborative relationship with your internal customers. Your constituents will value intelligence inputs that result in better outcomes; how questions are phrased is not what is important to them.

A critical skill set for competitive intelligence analysts includes the ability, experience, and mindset to look at problems differently, which often leads to suggestions for another way to approach an issue or to redefine the problem. A key element is ensuring that the key

**Do not hesitate to point out to your internal customers, especially senior management, the importance of taking the time early on in the project to gain a complete understanding of the intelligence request.**

intelligence questions asked are the ones that really matter to the decisions at hand. How we define an intelligence request usually determines how we approach the research and analysis that develop the answer. Poorly defined problems can send us off on a project whose deliverable ultimately does not answer the initial request.

## COMMON PITFALLS

Here are some common pitfalls you need to consider when evaluating the initial intelligence requests.

### No Focus – Too Broad

We can usually spot these requests right away – they're the ones that begin with the words "I need to know what ABC, Inc. is up to these days." A request this broad requires an analyst to drill down with questions such as:

- What business need or decision does this request support? How?
- What are the main expectations of the competitive intelligence research and analysis being requested?
- What outcomes and outputs does the requestor expect?
- How will this be meaningful to the organization?

### Miss the Mark - Definition Is Too Narrow

If you suspect that the request is too narrow (such as "What will ABC, Inc. price their new launch product at?"), ask your customer questions to broaden the scope. Identifying an exact price may be difficult or impossible, and it ultimately may not be information your internal customer can act on.

Probe to identify how your customer will use that information, then suggest another approach. This broadens the question so that the answer is attainable and the internal customer still benefits.

### Incorrect Assumptions Built Into Question

If you suspect that the question has been built on incorrect assumptions, raise the issue with your customer. A very natural and human tendency is to incorporate biases, beliefs, or incorrect assumptions into our thinking.

As skilled competitive intelligence analysis, our task is to step outside of "company think," recognize these

## SIDEBAR: CHECKLIST FOR ISSUE REDEFINITION

This checklist will help you create effective key intelligence questions when you accept new competitive intelligence requests.

- Identify and understand the business need or decision the questions will help support. This will help verify that the request meets the definition of a key intelligence topic as well as help you identify the real driver behind the question.
- Rephrase the question – without losing its original intent – to clearly and concisely interpret and understand the request.
- Redirect the focus of the request, if necessary, in one of two ways:
  - Broaden the focus on issues that are too narrow
  - Narrow the focus for topics that are too encompassing
- Challenge your customer about the assumptions they incorporate into their intelligence requests. Together rework incorrect assumptions or develop new hypotheses that better address the business issue.

biases, and bring attention to them, whether they reflective positively or negatively on the company, competitor, or overall environment. Recommend more objective ways of structuring a question, and work with your customer to identify other assumptions or alternative explanations that should be considered.

### Problem Statement Leads The Answer

One category of poorly defined problems are those that are solution driven. Show your client how the phrasing of the question leads to a specific answer, and work with them to modify the intelligence project question. In some cases, you may need to reach out to a wider group of analysts or peers who are knowledgeable on this topic to generate agreement on your perspective.

In summary, one of the best skills competitive intelligence analysts have in their toolkit is the ability to refine an intelligence request to ensure that it asks the right questions and it meets a business need or problem. This critical skill saves an analyst considerable time and eliminates reworking the project in the future. More importantly, it paves the way to deliver a product that truly adds value to the organization.

Take the time to meet with your internal customer and discuss in detail each intelligence request. In some cases you will need to correct the request for some of the common pitfalls outlined above. Refining intelligence requests may not involve a sophisticated analytical tool but it does require creative thinking and an open mind. Try it in your next project.

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