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Competitive Intelligence

Part 1: Strategy to Organization

@ShahinKhan

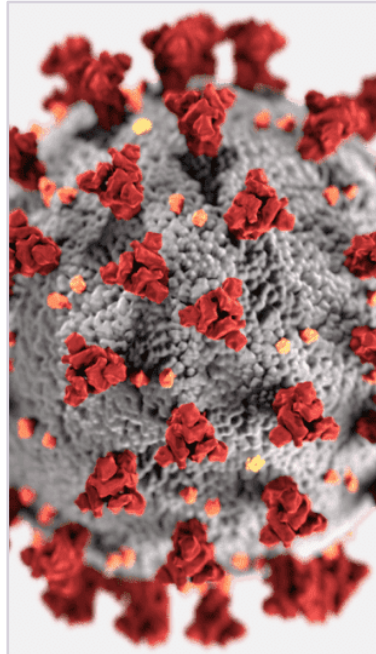Partner, OrionX

OrionX.net Webinar
Tuesday, June 30, 2020
11am Pacific, 2pm Eastern

Quick Set-up

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OrionX.net/webinar

Marketing in the Age of Coronavirus

4 Actions to Take Now

Dan Olds   Shahin Khan   Celia Chase

OrionX Webinar
Tuesday, March 24, 2020
11am Pacific, 2pm Eastern

**Build and Strengthen
Your Online Community Now**

Celia Chase
VP Marketing Services
OrionX

Linda Crowe
Director, IBM Community
IBM

OrionX.net Webinar
May 28, 2020
11am Pacific, 2pm Eastern

How To Create a Podcast Series

Dan Olds   Shahin Khan

OrionX Webinar
Thursday, April 30, 2020
11am Pacific, 2pm Eastern

Competitive Intelligence

Part 1: Strategy to Organization

@ShahinKhan
Partner, OrionX

OrionX.net Webinar
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Human Marketing

– Authenticity – Empathy – Advocacy –

New Digital

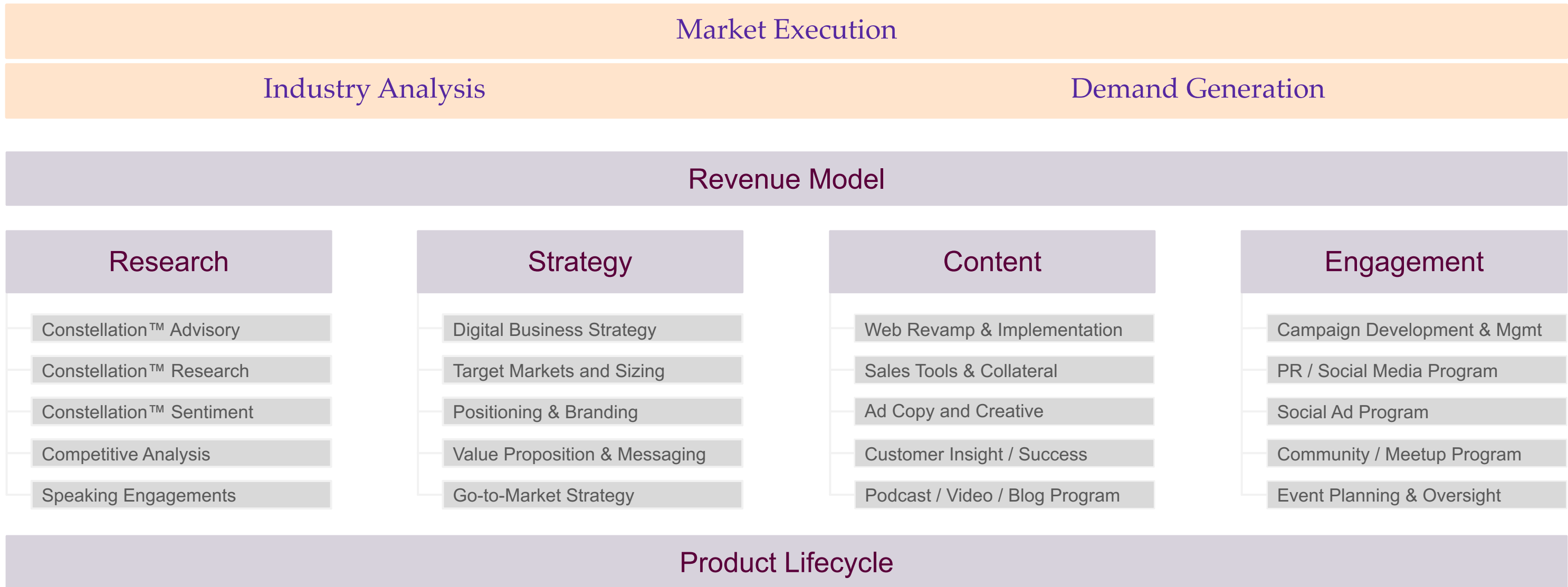- ✦ New Audience
- ✦ New Content
- ✦ New Competition

New Mission

- ✦ Quality of Engagement
- ✦ Ongoing Relationship
- ✦ Cultivate Community

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OrionX Services

Market Execution	
Industry Analysis	Demand Generation

Revenue Model

Research	Strategy	Content	Engagement
Constellation™ Advisory	Digital Business Strategy	Web Revamp & Implementation	Campaign Development & Mgmt
Constellation™ Research	Target Markets and Sizing	Sales Tools & Collateral	PR / Social Media Program
Constellation™ Sentiment	Positioning & Branding	Ad Copy and Creative	Social Ad Program
Competitive Analysis	Value Proposition & Messaging	Customer Insight / Success	Community / Meetup Program
Speaking Engagements	Go-to-Market Strategy	Podcast / Video / Blog Program	Event Planning & Oversight

Product Lifecycle

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Competitive Intelligence Webinar Series

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Competitive Intelligence Webinar Series

Part 1: This Webinar

Strategy to Organization: Structure and Big Rules

Part 2:

Organization to Intelligence: Analysis and Synthesis

Part 3:

Intelligence to Action: Sales Enablement

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What is Competitive Intelligence?

It's an Organization
Unlike Competitive Analysis

Focused on Competitiveness
National, Corporate, Sales

Understands Your "Supply Chain"
Market Trends, Your Strengths, and
Customers' Needs, Behavior, and Choices

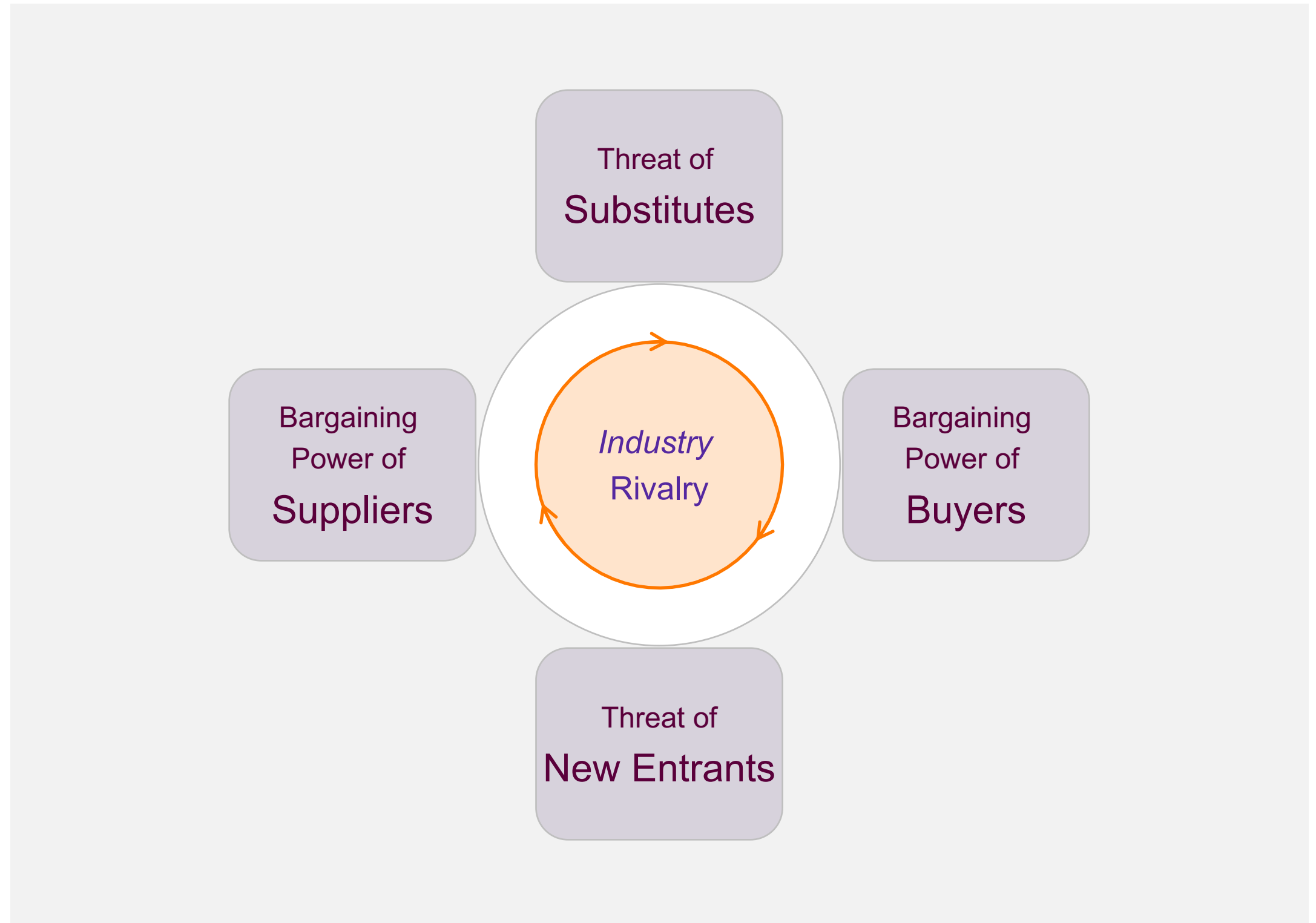## Builds Tools and Processes to
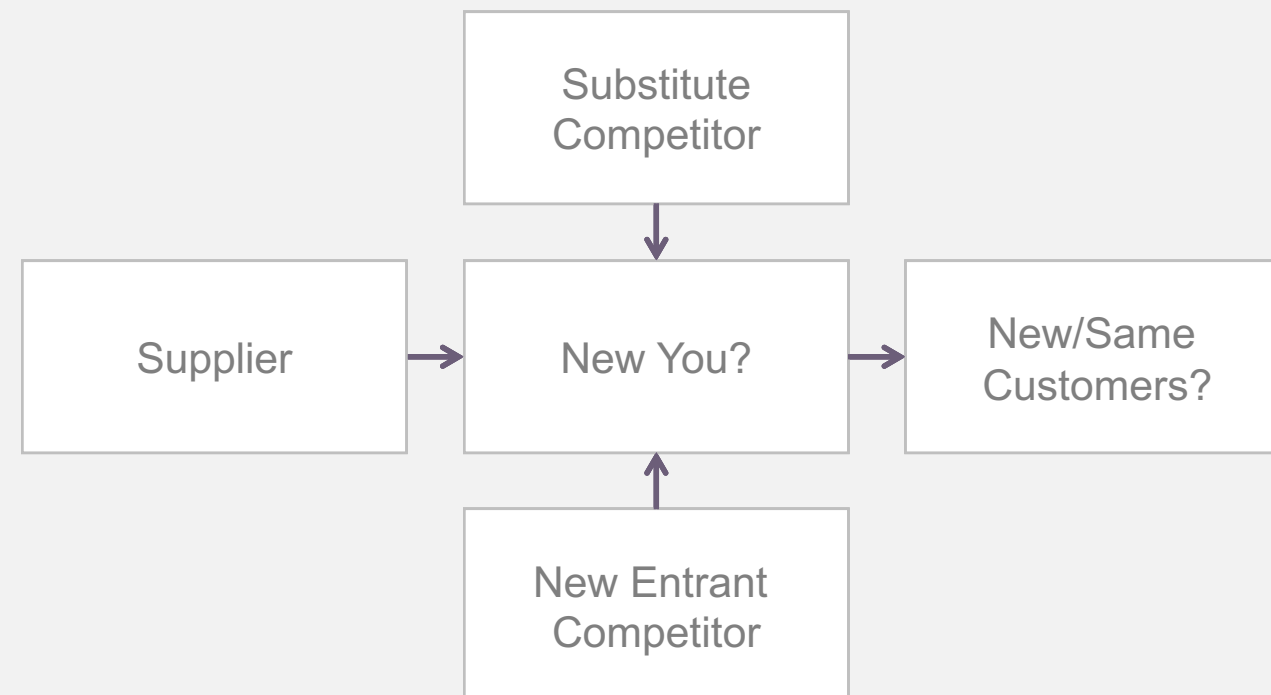Set policies to win strategically
Build tools to win tactically

Strategic Framework
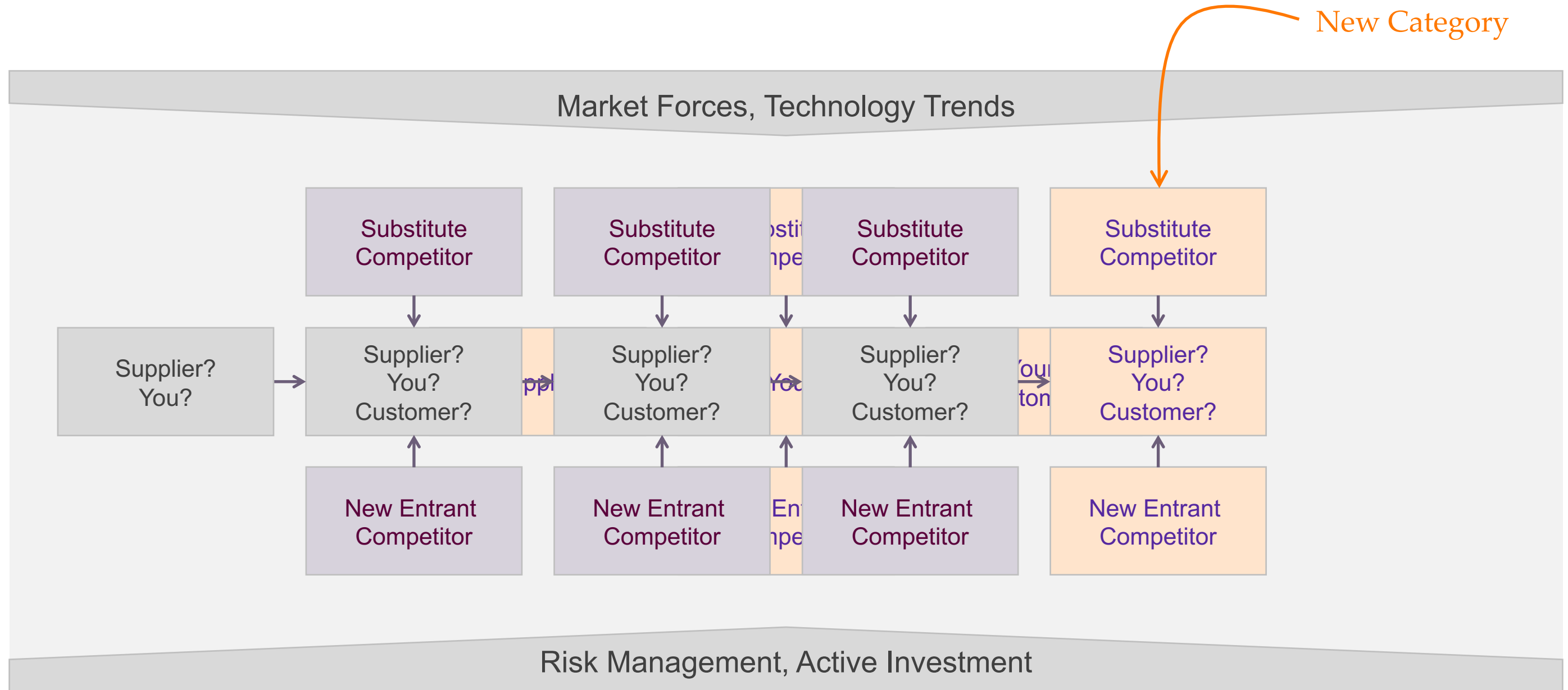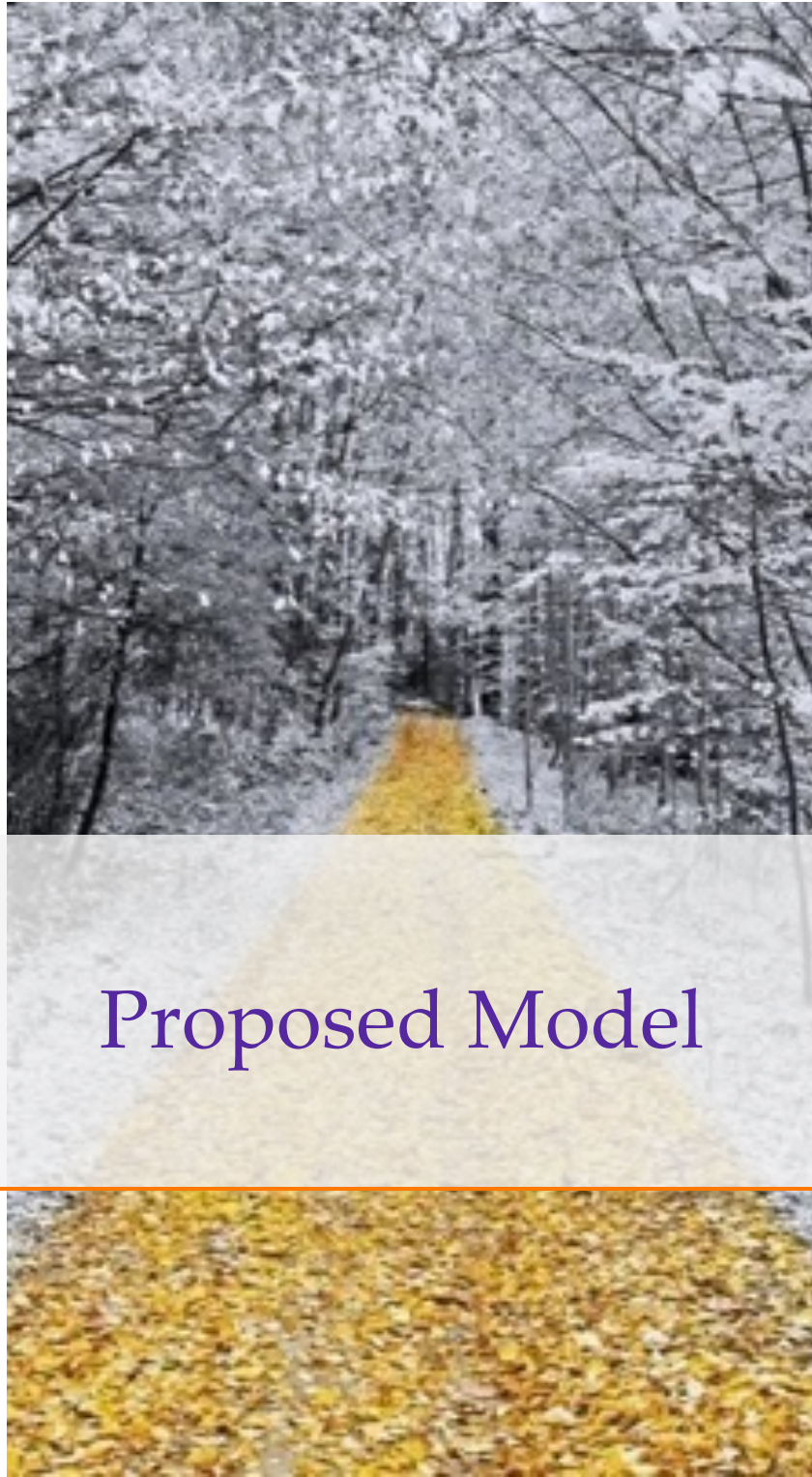
Porter's Five Forces

Threat of
Substitutes

Bargaining
Power of
Suppliers

Industry
Rivalry

Bargaining
Power of
Buyers

Threat of
New Entrants

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Porter's Five Forces in a Supply Chain

Understanding What You Offer, Who You Are, and Who You Sell to

New Category

Market Forces, Technology Trends

| Substitute Competitor | Substitute Competitor | Substitute Competitor | Substitute Competitor |

| Supplier? You? | Supplier? You? Customer? | Supplier? You? Customer? | Supplier? You? Customer? | Supplier? You? Customer? |

| New Entrant Competitor | New Entrant Competitor | New Entrant Competitor | New Entrant Competitor |

Risk Management, Active Investment

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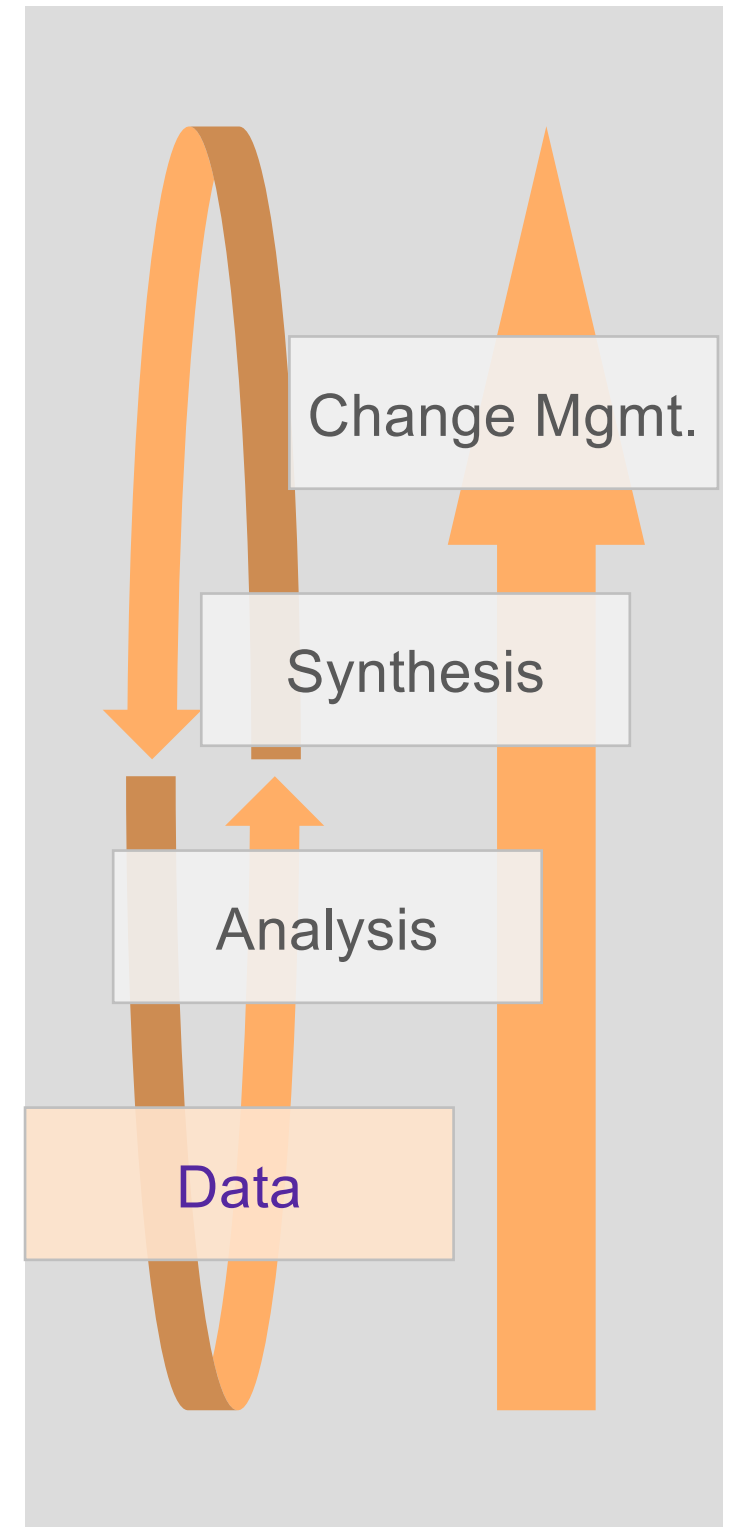# Important Data and Processes

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Proposed Model

Will it achieve
business objectives?

Can it be
implemented?

Change Mgmt.

Synthesis

Analysis

Data

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Types of Data

Product, Tech

The OrionX Constellation™ Technology Decision Tool
©2016 OrionX.net
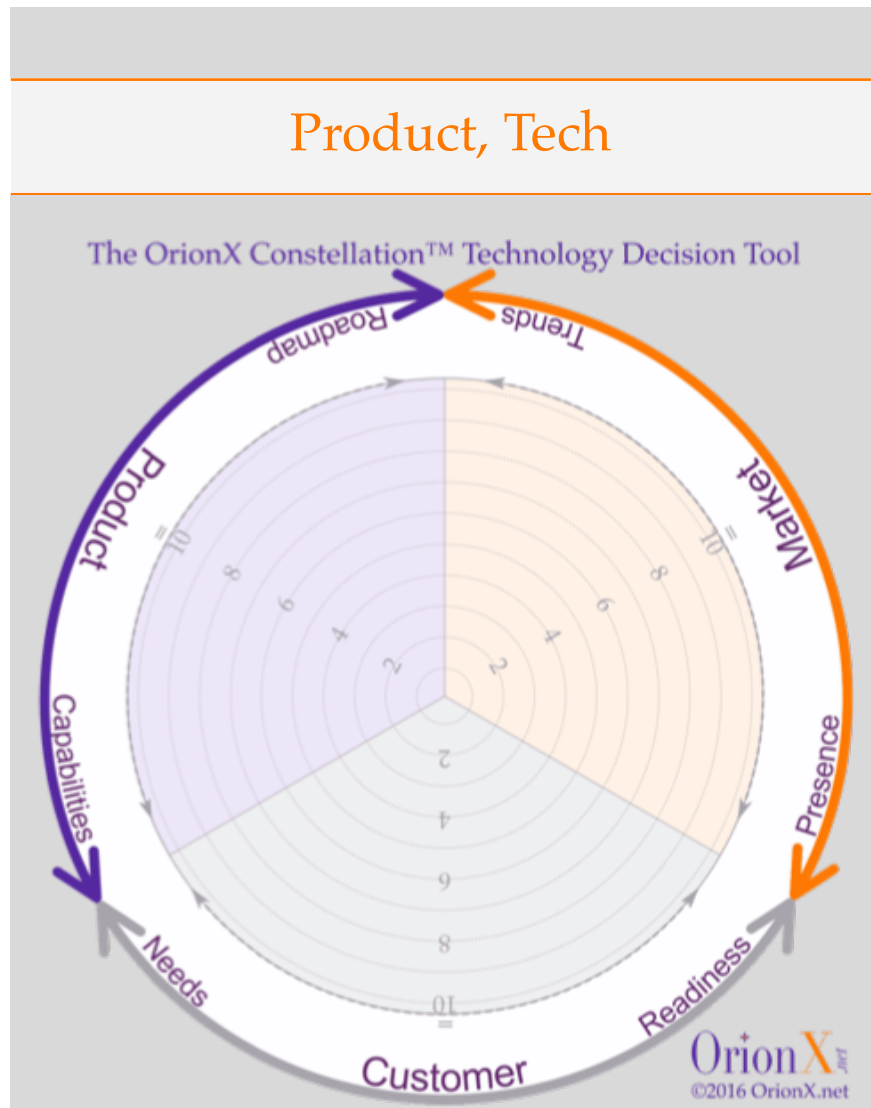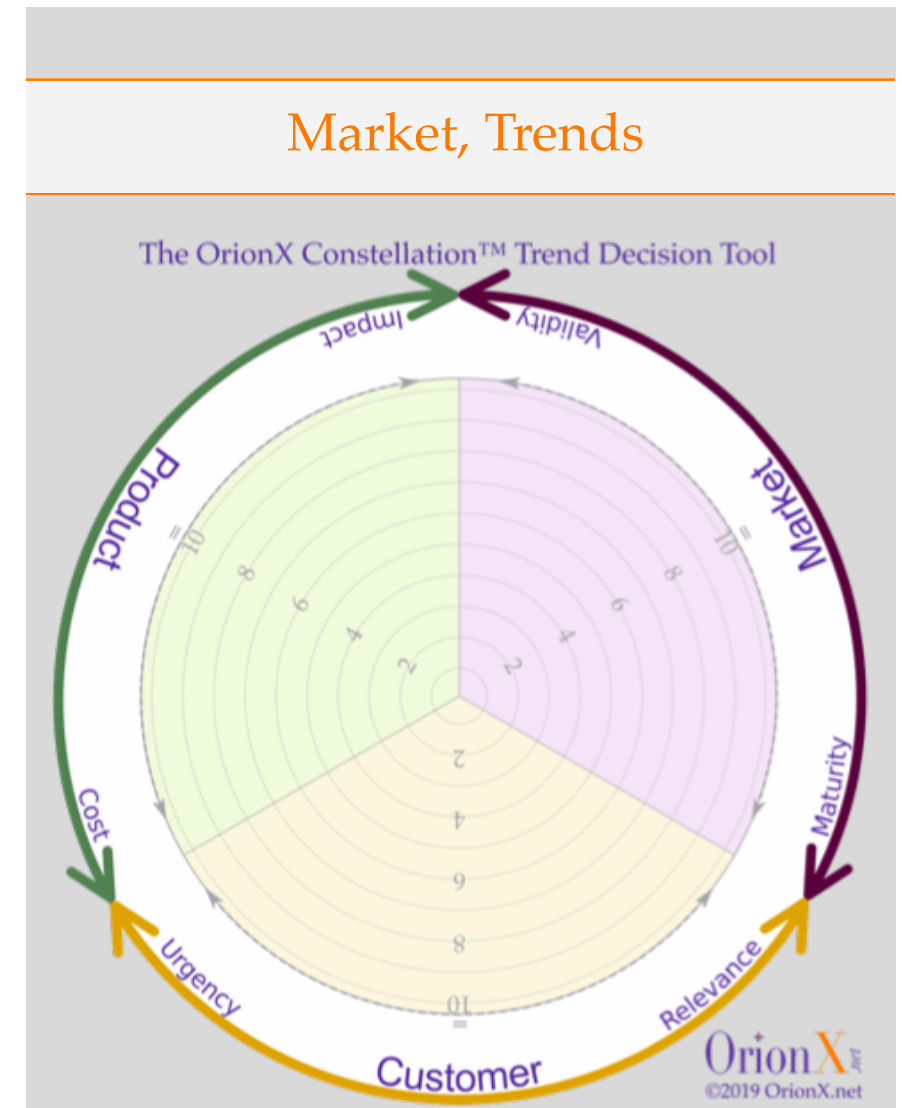
Customer, Sales

- ✦ Needs Analysis
- ✦ Investment Priorities
- ✦ Buying Behavior
- ✦ Corp Roadmap
- ✦ Win-Loss
- ✦ Satisfaction
- ✦ Referenceability

Market, Trends

The OrionX Constellation™ Trend Decision Tool
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Inbound Gathering of Data

Quick ⟵⟶ Systematic

Ad Hoc

- ✦ Customer visit
- ✦ Briefing center
- ✦ Events/shows
- ✦ Web research
- ✦ PR/AR interactions
- ✦ Success story collateral

Project Based

- ✦ Online survey
- ✦ 1:1 interviews
- ✦ Product blogs
- ✦ Focus groups
- ✦ On-site staff
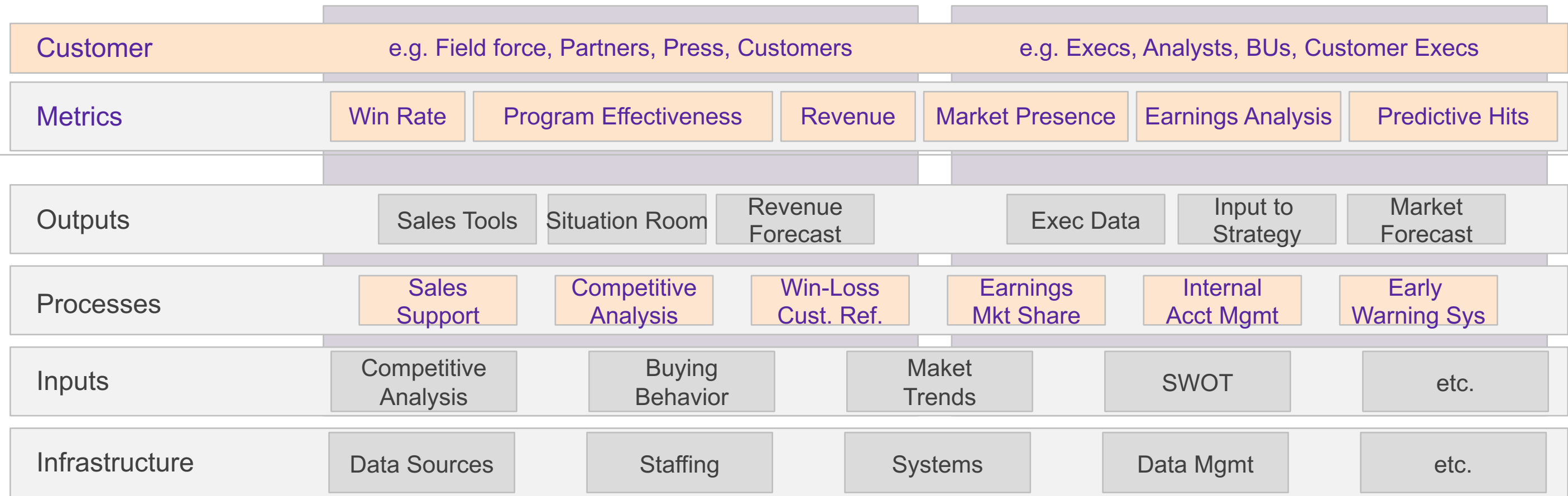- ✦ Leading-edge customers

Corporate Process

- ✦ CAB / UG
- ✦ Satisfaction/Loyalty Surveys
- ✦ Competitive Intelligence
- ✦ Corp Strategy process
- ✦ Social Media
- ✦ CRM mining
- ✦ Early Access Programs

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Analysis Work

- **Market Trends**

- **Customer Values**
  - Time Horizon, Complexity of Buying Process, Risk Tolerance, Scale of Deployments

- **Brand Attributes**
  - Investors, Customers, Employees, Influencers

- **SWOT**
  - Strengths, Weaknesses, Opportunities, Threats

- **Market Map**
  - Mega Trends, Brand Permission, Customer Needs, Barriers

- **Product and Technology**
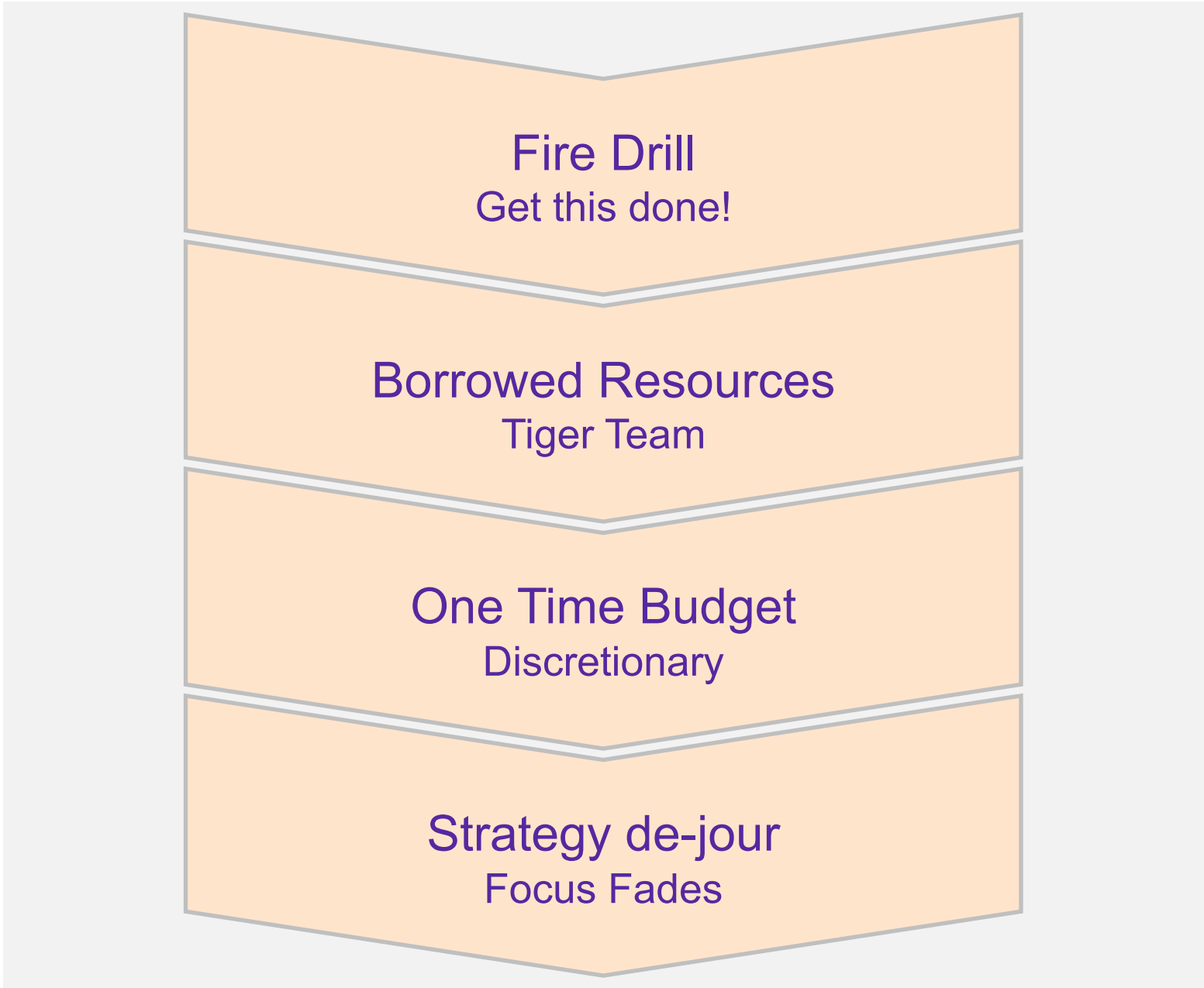 - Head to Head comparisons

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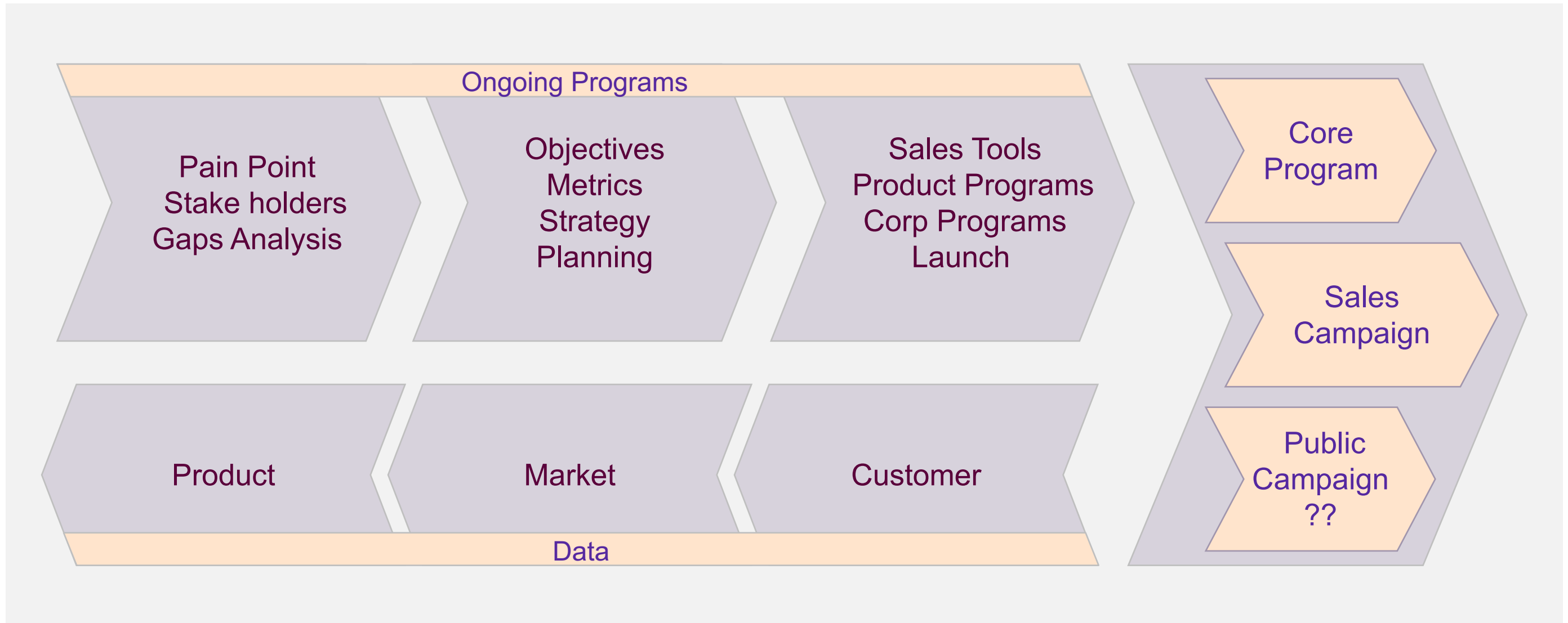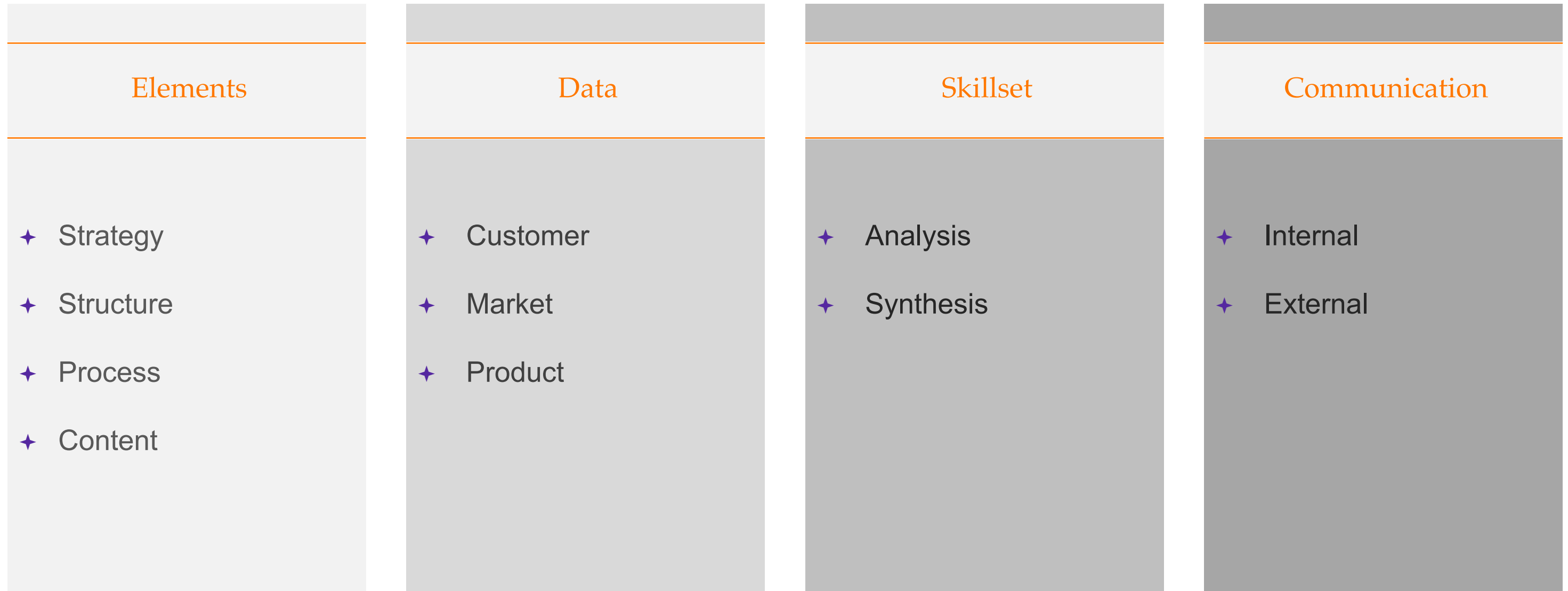# Key Processes, Deliverables, Metrics, and Audiences

Customer	e.g. Field force, Partners, Press, Customers	e.g. Execs, Analysts, BUs, Customer Execs

Metrics	Win Rate	Program Effectiveness	Revenue	Market Presence	Earnings Analysis	Predictive Hits

Machine

Outputs	Sales Tools	Situation Room	Revenue Forecast		Exec Data	Input to Strategy	Market Forecast

Processes	Sales Support	Competitive Analysis	Win-Loss Cust. Ref.	Earnings Mkt Share	Internal Acct Mgmt	Early Warning Sys

Inputs	Competitive Analysis	Buying Behavior	Maket Trends	SWOT	etc.

Infrastructure	Data Sources	Staffing	Systems	Data Mgmt	etc.

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Organizational Issues

Typical Picture

Fire Drill
Get this done!

Borrowed Resources
Tiger Team

One Time Budget
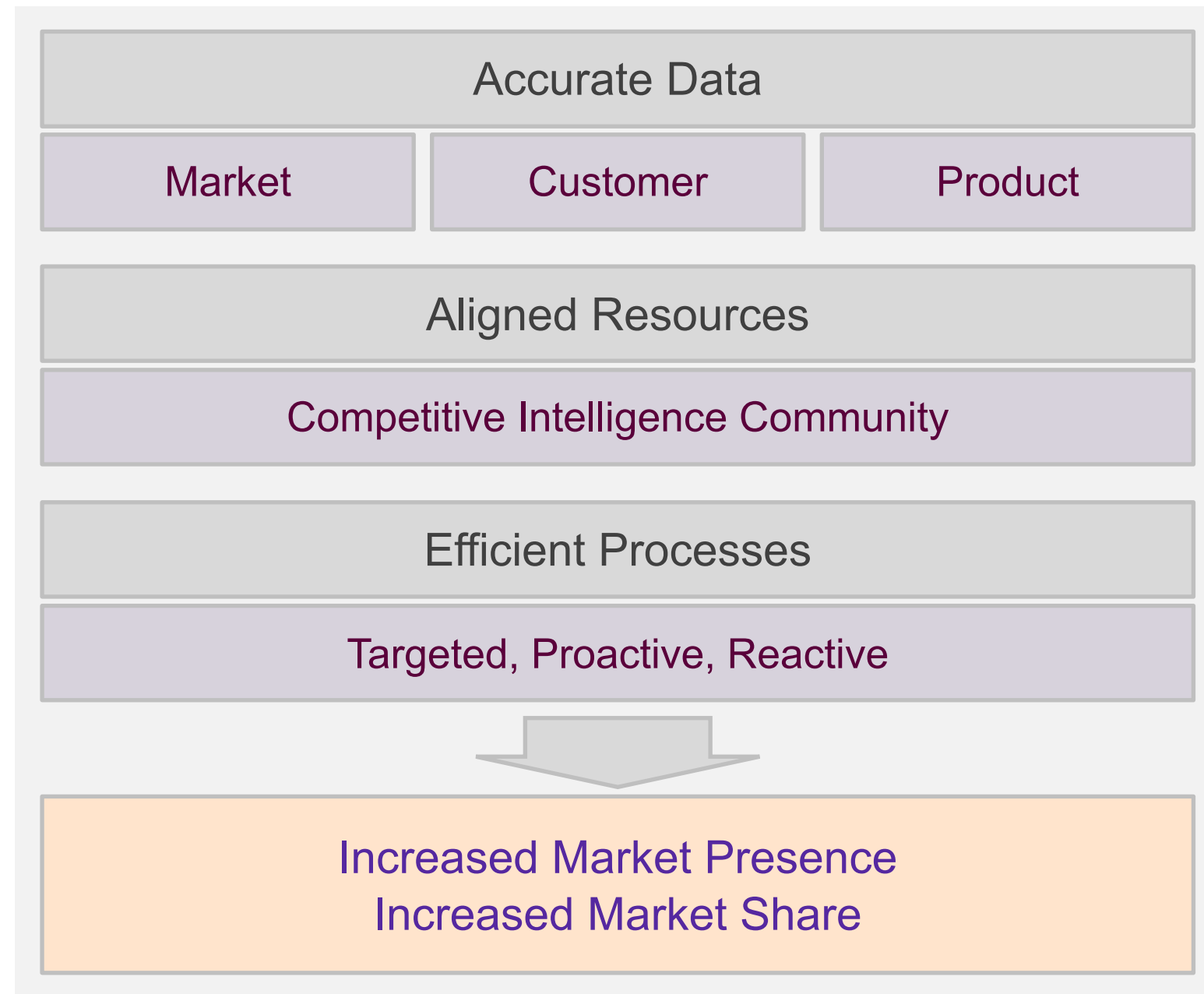Discretionary

Strategy de-jour
Focus Fades

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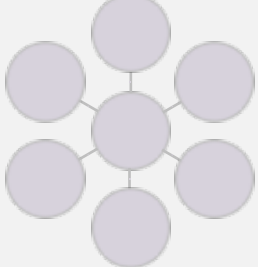# How it Should Be Done

Dimensions of Competitive Intelligence

Elements	Data	Skillset	Communication
✦ Strategy	✦ Customer	✦ Analysis	✦ Internal
✦ Structure	✦ Market	✦ Synthesis	✦ External
✦ Process	✦ Product		
✦ Content			

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Elements of Success

Accurate Data

| Market | Customer | Product |

Aligned Resources

Competitive Intelligence Community

Efficient Processes

Targeted, Proactive, Reactive

Increased Market Presence
Increased Market Share

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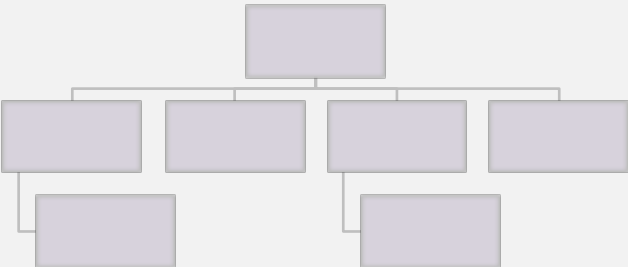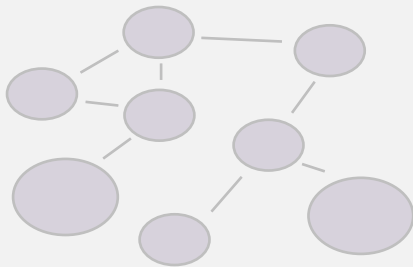
Organizational Models

Centralized	Decentralized	Hub & Spoke
✦ Consistency, Control ✦ Funding / Support, Communication	✦ Fast response and experiments ✦ Uncoordinated, can lack holistic view	✦ Federated, Best of both ✦ Takes time, vigilance

Constituents, Sponsors, Support

✦ How is formed and where it reports to ?

✦ Strategic vs. tactical mission

✦ Company vs. Product/BU priorities

✦ Reactive vs. Proactive

✦ Execs: has need vs. has veto power

✦ etc.

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12 Prescriptions

1. Don't Compromise Integrity

- ✦ Always Rule #1

- ✦ Win legally and ethically

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2. Take it Seriously

✦ Whoever takes it more seriously wins

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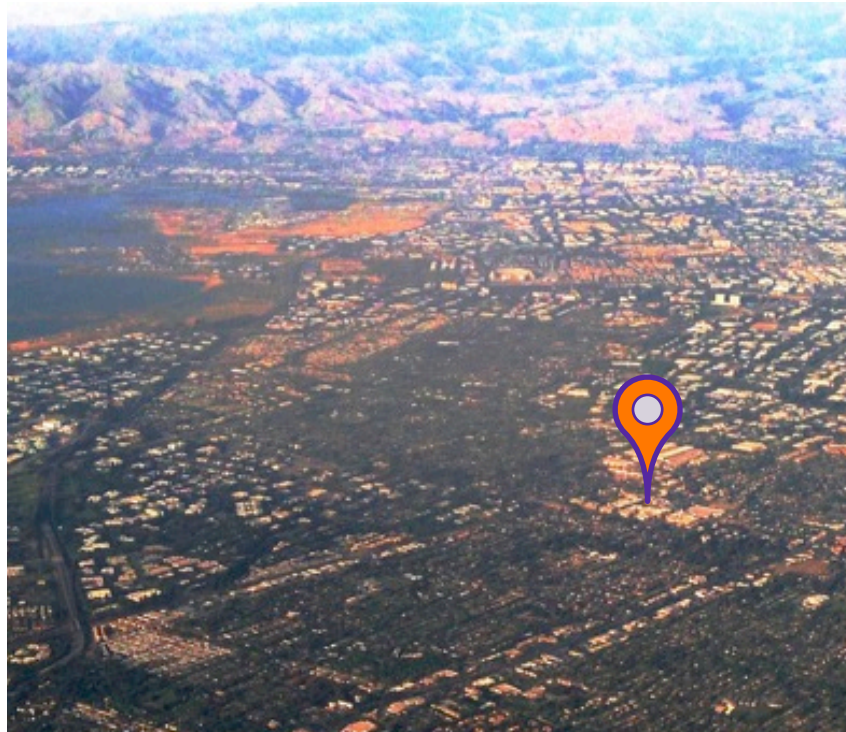
3. Respect your competition
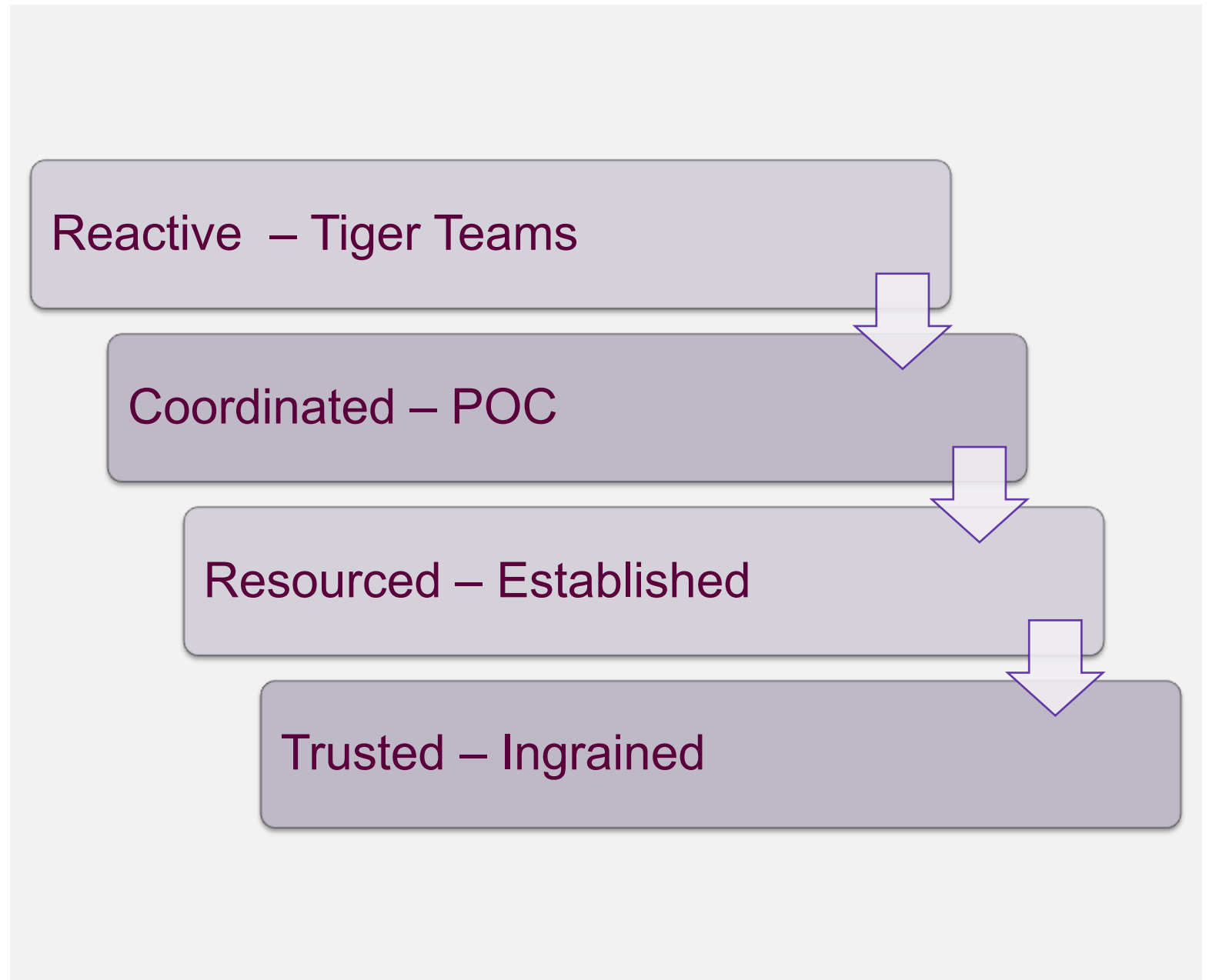
✦ If customers are buying them, find out why

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4. Lead vs. React

- ✦ Project your own vision vs. react

- ✦ Leadership, not just matching others

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5. Create a CI Roadmap

Reactive – Tiger Teams

Coordinated – POC

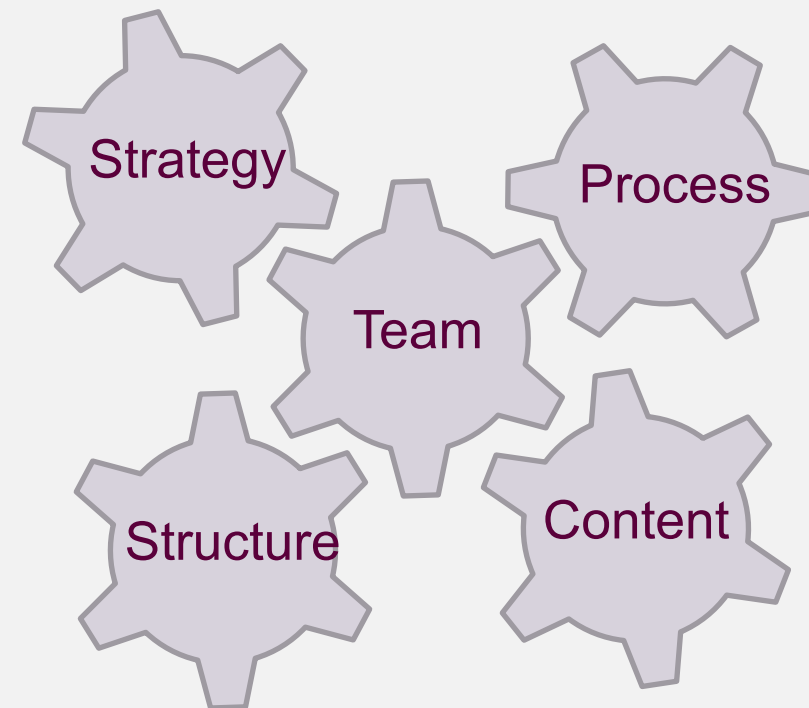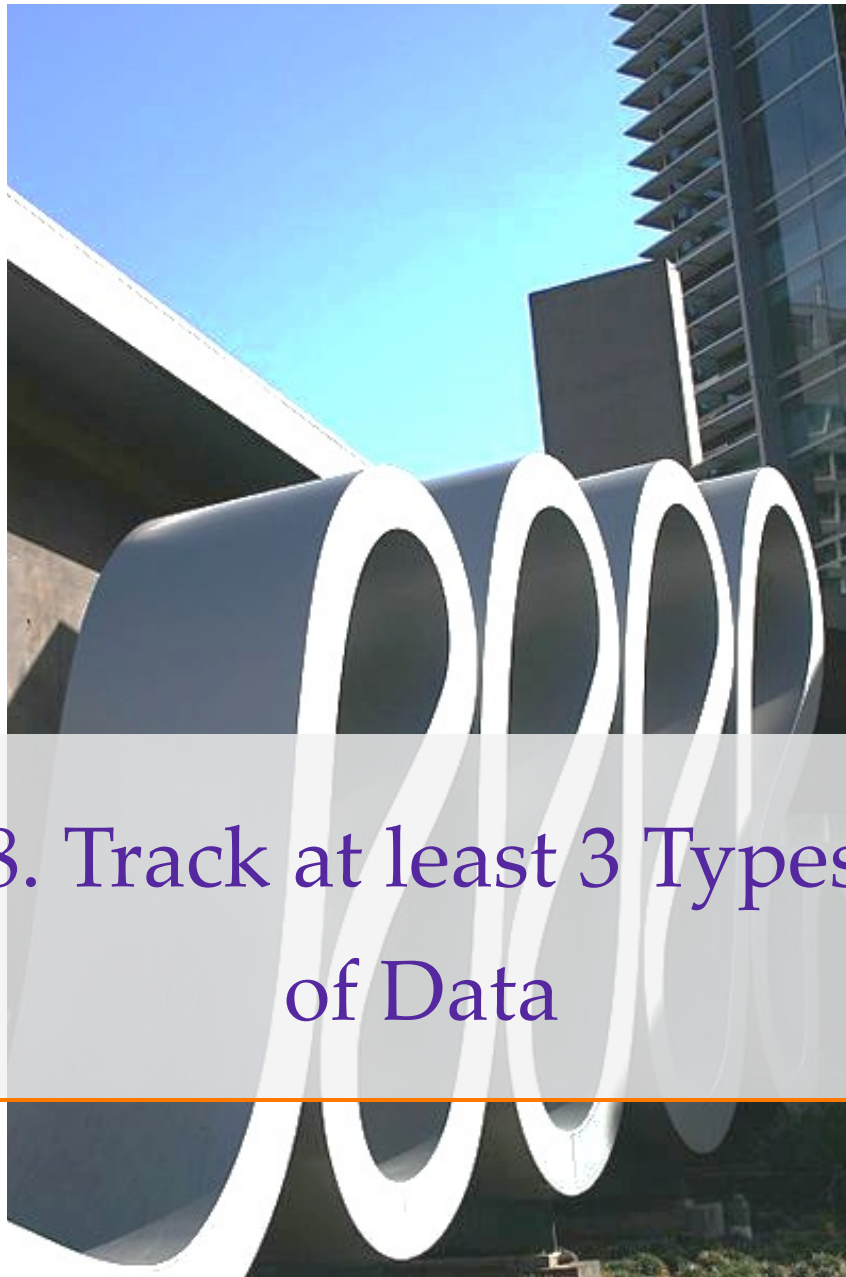Resourced – Established

Trusted – Ingrained

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6. Make it Ongoing

- ✦ Make it a program but fail fast, make decisions, and move quickly
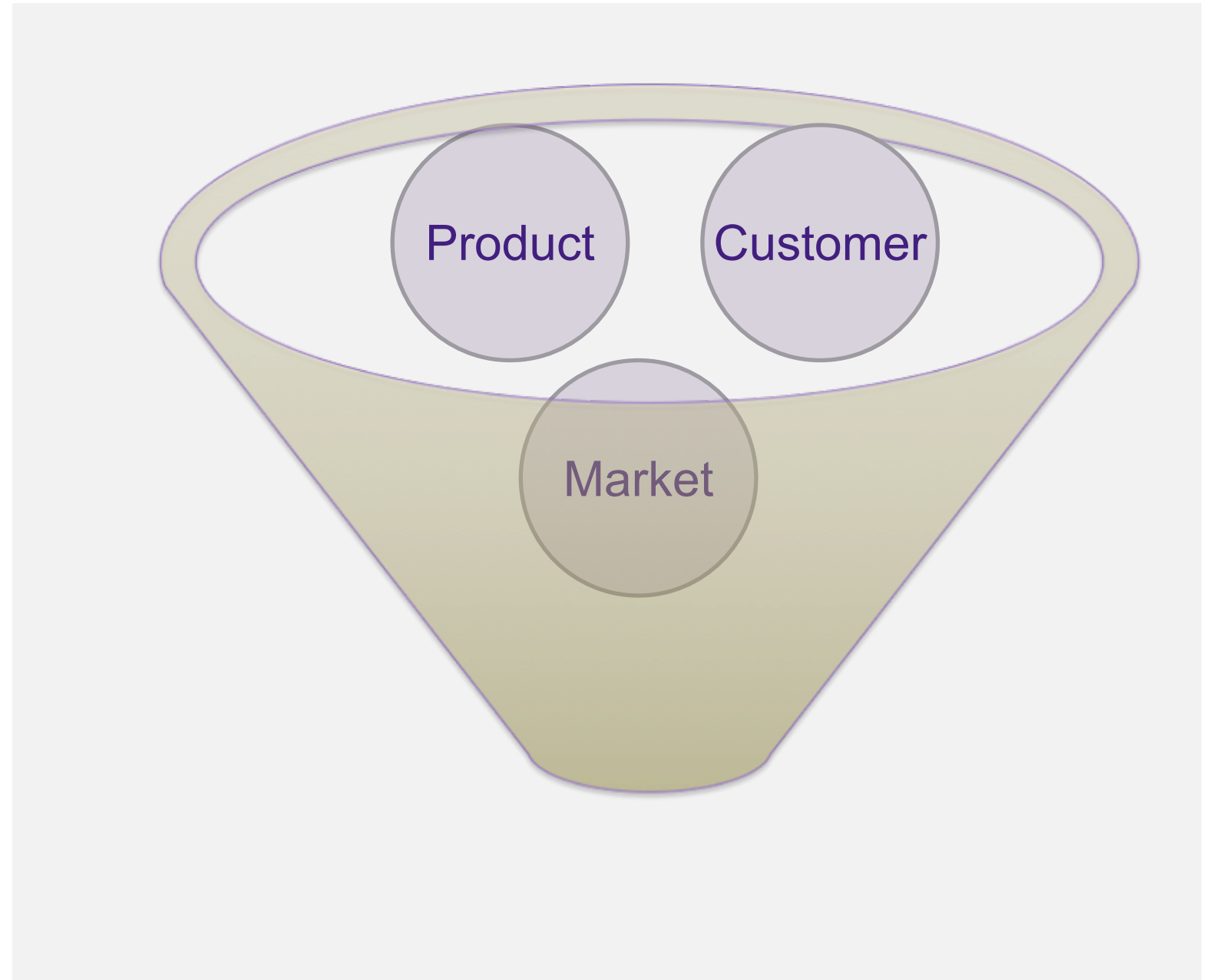
- ✦ One-off projects don't retain valuable learning

Strategy

Process

Team

Structure

Content

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7. Trust your team to interpret data

✦ … or get a new team

8. Track at least 3 Types of Data

Product

Customer

Market

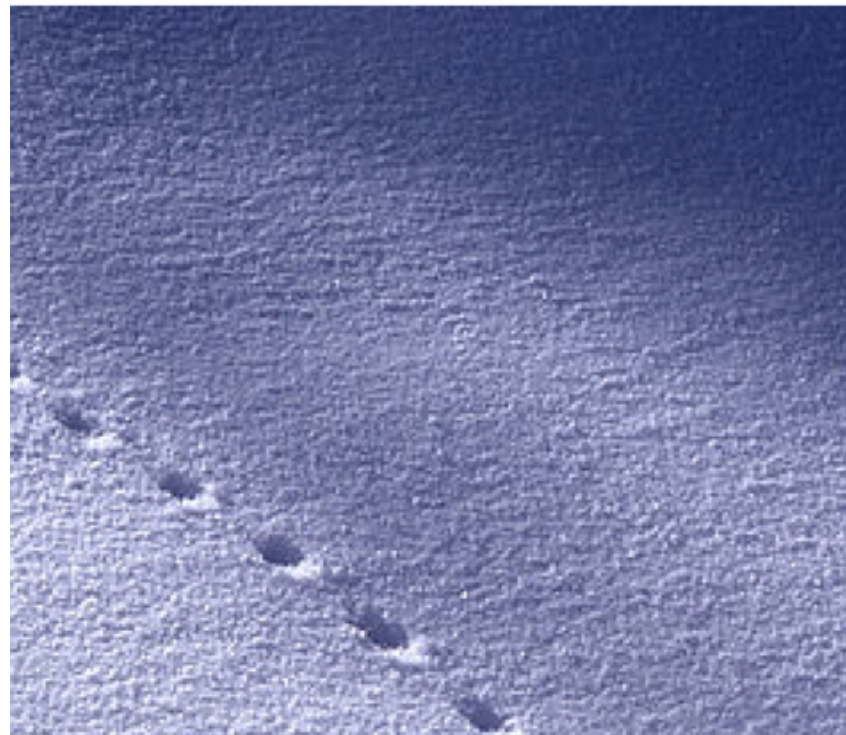OrionX _net_

9. Build Skills in Synthesis

✦ Synthesis is the purpose of analysis , and they are different skillsets

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10. Excel in Tactical First

✦ … then you can become strategic

✦ You need a system and know how to operate it before you can set the course

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11. Ask "So what?"
Repeatedly

✦ Follow the trail until you get to the salient point

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12. Build the Internal Community

- ✦ Competitiveness is like Quality:

    It's everyone's business

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Summary

- ✦ Competitive Intelligence permeates everything

- ✦ Programs – not one-off deliverables

- ✦ Project leadership, don't reacting

- ✦ Quality not quantity

- ✦ Identify success metrics

- ✦ Get help to jump-start!

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Questions?

Shahin Khan	Cindee Mock	Dan Olds	Celia Chase	Stephen Perrenod	Laura Drago

Let's Connect
info@OrionX.net
or
first.*last*@OrionX.net

- ✦ Simplifying 5G, IoT, HPC/AI, Blockchain/Crypto, Quantum

- ✦ Human Marketing budgeting/planning/execution

- ✦ Community strategy/program development

- ✦ Customer-focused content creation (video, podcast, collateral, web copy, etc.)

- ✦ Competitive Intelligence, customer input, strategy process

- ✦ Educational webinars and podcasts hosted by our research analysts

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Questions?

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