



Thursday, December 11, 2003

ISSUE 44

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Primary sources to help you control your cow. (part 1 of 2)

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"To control your cow, give it a bigger pasture." - Suzuki Roshi, Zen Master

In the field of competitive intelligence (CI), primary research is loosely defined as 'in-depth interviews' with individuals likely to be intimate with competitor or marketplace activity. This might include employees of a competitor, suppliers and buyers, partners, pundits, former employees and many other sources ranging from neighbors to local government figures. Everything else seems to become secondary research by default.

Is there room for more stratification? Could this perhaps be as simple as 'first person accounts'(and related) versus 'one step removed'?

For a moment, let's rethink what we're doing when we call 'all other' secondary research. It feels as though secondary has now become just about anything that can be faxed, photocopied or printed on cheap paper in black and white ink on old machines (think: after Chaplin rolled through the gears in *Modern Times*, but before Reeves entered *The Matrix*).

Step back from popular CI industry definitions, if you will, and imagine primary research to more broadly encompass any primary source that permits us to get close to what is happening, has happened or will happen while reflecting the individual viewpoint of the observer, participant or otherwise intimately involved people.

This might allow you to generate alternatives where staple secondary research sources are exhausted, come up short, or otherwise prove to be of little value without deeper context. Isn't this why we often spend so much time on the primary research? Though analysis is absolutely critical, but primary research consumes the lion's share of project hours.

I'm not trying to reinvent the wheel here, just trying to reframe the Rosie-O'Donnell-sized universe of resources now available to all of us. If one were to reorganize secondary resources so that primary sources become more like a 'layer of meaning' (or value) superimposed on all such resources, then perhaps these might fall under the auspices of the following broad categories (broad because this column must stay short, not because I'm simple minded).

Memoirs, manuscripts, autobiographies and 'corporate cheerleader' business books

Tell-all stories and 'how I conquered the industry' books are generally the bane of my existence. Often these first person accounts are rife with bias, related distortion, dimming memories or outright 'creative or selective' memory. I much prefer quality fiction.

However, buried within many of these historical tales – both in print and in online excerpts – are countless references to specific project codenames, key figures, key dates and other data points often not captured in the reviews and brief write-ups. These range from Bill Gates' 'Road Ahead' to the book-

turned-movie tale, 'Barbarians at the Gate' (the RJR LBO war story).

Many other online libraries and related projects make a lot of text available online (in which books, manuscripts and other documents are scanned in to archives). For this, the Internet Public Library serves as a solid example (www.ipl.org), as well as the Smithsonian Institution Research Information System (www.siris.si.edu), which also connects extensively to other categories discussed herein, ranging from photographs to manuscripts. Oh, and Barnes & Noble also operates as a library if one chooses to not leave the premises.

There will be 'freshness' issues surrounding the information. For research, focus instead on insight into attitudes and culture and, where relevant, first person accounts of major corporate transactions. I find it quite helpful to pull out the old pet project names used in corporations to track down living figures connected to the original effort.

For example, while researching operating systems, I had tremendous interest in a particular project from the 80's, and needed to track down the projects personnel nearly 18 years later. I found an ancient personal memoir that had been reproduced online. It detailed original (and unusual) codenames for the project during the first few years, along with notes regarding specific individual contributions. Using this information, I refined basic searches and tracked down the sources with a few phone calls.

Diaries, minutes, personal web pages, 'blogs,' journals, letters and memos

First person accounts, replete with attitude and a full slant, are wonderful resources for uncovering key figures as well as for corroborating findings. While published diaries and first person narratives are often dated, many blogs and personal web pages are quite current.

I've mentioned one site many months ago, InternalMemos.com (www.internalmemos.com). They are focused on gathering insider memos from major corporations. Interesting stuff...a bit smarmy, but really very interesting. Beyond the memos are the infinite corporate and industry rumor mills (a subject of a much earlier column in 2003). These are interesting resources to keep in mind as they often overlap with the blog entries found on personal sites.

For those unfamiliar with web logs (aka blogs), picture a world full of updated online diaries and personal narratives connected dynamically to large socially networked communities. Regular people have decided to take themselves very seriously and assume that others will want to follow their occluded daily and weekly thoughts, bookmarking their often cryptic and poorly maintained diaries. Can you tell that I'm kind of down on blogs? If you really want to get technical about what makes a blog, you can read up on the subject at Harvard Law School (<http://blogs.law.harvard.edu/whatMakesAWeblogAWeblog>). By the way, the same goes for the vast universe of dull personal home pages.

With my own purposes in mind, I'm generally far less interested in what's 'on the blog' or the personal home page than what's connected to it; that is where I find tremendous value. These authors often maintain extensive links to industry and social relationships, typically as a long vertical list of names (connected to other blogs or personal pages). This is an outstanding resource for those consultants constantly in search of a better or more knowledgeable source, preferably connected to the original source. There is a risk: you might wind up tracking down buddies from their softball team as well as from work and industry.

For example, while researching advanced security architecture, I stopped by the personal page of Ron Rivest at MIT (<http://theory.lcs.mit.edu/~rivest/>). For those unfamiliar with Ron Rivest, he's the 'R' in 'RSA,' arguably the most important commercial encryption company in recent decades. Within his site, a hyperlink to a larger page of industry and personal links, scroll down to 'people' to see what I mean (<http://theory.lcs.mit.edu/~rivest/crypto-security.html#People>).

Regarding minutes and records, these are often insightful where they come from an organization or association of interest. They might glean tremendous insight into current attitudes and planning activities. I can't possibly pay homage to the discipline of public (and related) records research in this one paragraph - sorry.

Use common sense and care when expanding the pasture.

I'm certainly not advocating the use of any of these methods in particular, as many will not be applicable to your own projects. Rather, I humbly suggest that we rethink the value of primary sources as they map to primary and secondary research. All of the aforementioned resources will allow for one to get a bit closer to an event, organization, or individual of interest prior to telephone interviews.

By the way, have you noticed a theme? It's an interesting conundrum. These categories, like much of secondary research I suppose, are all potentially very time-consuming and unproven as particularly valuable for any one need in our interview-driven industry. I'd be very hard pressed to add "20 Hours: Watching Television" to any of my own proposals...though I'd be much more uncomfortable requesting "Another 40 Hours: Primary Research" as a result of unimaginative resource planning.

Editor's note: Here are references to earlier scip.online articles by David Carpe:

Carpe Diem: Direct pathways to human sources via the Internet. (16)

http://www.imakenews.com/scip2/e_article000093419.cfm

Carpe Diem: Dazzle them with your brilliance. (18)

http://www.imakenews.com/scip2/e_article000102763.cfm

Carpe Diem: get smart online without an MBA. (17)

http://www.imakenews.com/scip2/e_article000098961.cfm

Carpe Diem: on experts and why the Greeks liked Ulysses. (19)

http://www.imakenews.com/scip2/e_article000106826.cfm

Carpe Diem: slinging mud, spreading rumors, and leaking like a sieve.

http://www.imakenews.com/scip2/e_article000119157.cfm

Diggin' deep online to profile an executive: part 1. (32)

http://www.imakenews.com/scip2/e_article000153473.cfm

Diggin' deep online to profile an executive: part 2. (33)

www.imakenews.com/scip2/e_article000157597.cfm

Background:

David Carpe received his BFA from the George Washington University and his MBA, with a concentration in Finance and Entrepreneurship, from Babson College. He has authored a case on Valuation for the Division Chair and has also served as a Volunteer Teacher with the National Foundation for Teaching Entrepreneurship. Professionally, David has worked in research with Fidelity Capital, served as a Management Consultant, acted as the founder and CEO of a venture backed software startup, and most recently has been working with Clew, LLC www.clew.us serving some of the world's most formidable organizations through Clew's CI for Strategic Human Resources practice (HRCI) and ClewRaRE™ services. David, his two sons, and their dog reside in Lexington. He is a member of SCIP, MIT Enterprise Forum, Human Capital Institute and IRE and serves on the Board of Conditor, LLC. David has spent the majority of his career involved, somehow, with research, analysis, consulting and planning. He can be reached at 781.674.CLEW (2539). As mentioned in earlier columns, please feel free to send an email if you have questions or comments: contact@clew.us

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