

Article from **Newsletter** ([http://www.imakenews.com/scip2/e\\_article000210584.cfm?x=a2s4g9J,a1qFPVd4](http://www.imakenews.com/scip2/e_article000210584.cfm?x=a2s4g9J,a1qFPVd4))

December 12, 2003

## **Primary sources to help you control your cow: part 2.**

by *David Carpe*

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

David Carpe, [david@clew.us](mailto:david@clew.us)

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

In part one of this column, I introduced the idea that CI consultants might benefit by thinking a bit more like disciplined librarians when managing secondary research resources. For many, this might be as simple as separating such resources into 'first person accounts' (and related) versus 'one step removed.'

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?

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 persons.

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? Although analysis is absolutely critical, primary research consumes the lion's share of hours in execution.

If you 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).

#### **Movies, television, audio and video files**

This is a large trough of content from which to feed. There are many movies and documentaries tightly focused on issue/incident exploration, from the tobacco industry to children's entertainment. For a quick sample, one might visit the Internet Movie Database ([www.imbd.com](http://www.imbd.com)) or the categorically organized documentaries and specials on commercial sites like Amazon.com or NetFlix ([www.netflix.com](http://www.netflix.com)).

Expect to find first person accounts, extensive interviews, commentary, as well as several resources via the bibliographic archiving of sources (might be found within credits, or special sections on DVD's, both quite valuable). By the time it hits the screen, it is likely old news, though these are still great resources where the desired observer or participant proves to be inaccessible.

Consider also the world of television and radio transcripts. While several major Internet based projects are already underway to advance this archiving effort, I've mentioned one before – TVEyes ([www.tveyes.com](http://www.tveyes.com)). With such tools, one might search transcripts and set up keyword alerts to monitor target subjects as mentions occur during interviews and broadcasts.

Lastly, reconsider the Internet itself. Beyond the obvious document collections buried alive online, there are also many audio and video components. For example, visit a major corporation like Sun Microsystems and you'll find archived video clips of keynote speaker presentations, interviews, and other subject-specific information. You'll also find detailed web seminars and similar technical presentations. Internet video clips (e.g. interviews, speeches) are often considerably more current and worth noting.

#### **Photographs and artifacts**

Photographs are intuitive resources. Imagine that you're trying to profile a major organizational figure. You've tracked down articles, many with images, and now seek to interview individuals with something interesting to say. Peers and close relationships have rejected your overtures, so you consider revisiting the images. Standing alongside the figure at a corporate charity event are five figures, identified within the caption. You pick up the phone, call all five, and uncover one with something to offer (now this is starting to sound a bit like journalism).

Alternatively, images might serve an altogether different purpose. For example, one might seek to estimate foot traffic at a competitive retailer without sporting a 'clicker' in the doorway. This individual might photograph the parking lot at various times of day, over a period of time, and model the series to produce guesstimates. I think that you get the basic idea.

One interesting resource mentioned in part one of this series is the Smithsonian Institution Research Information System ([www.siris.si.edu](http://www.siris.si.edu)), which also connects extensively to other categories discussed herein, ranging from rare books to manuscripts and other. SIRIS maintains an enormous archive of photographs, all freely available to the public.

Same thinking goes for artifacts, though this requires a bit more creativity. Picture the physical 'stuff' that might be in the possession of the target. Understanding what they've purchased or leased might allow for one to surmise that spending habits are wanton, tight, or conservative.

For example, a target organization is liquidating high end office furniture and seeking to procure lower end items. This might tell you something about their financial sensitivity, and the information might only be as far away as a local paper, a liquidator listing (Gordon Brothers runs [www.RetailExchange.com](http://www.RetailExchange.com)), or Craigslist classifieds ([www.craigslist.com](http://www.craigslist.com)). For specialized industry connections, you might consider contacting the International Reciprocal Trade Association ([www.irta.com](http://www.irta.com)).

### **Observation**

For purposes of this brief column, let's describe observation as:

1. a little bit of all of the above
2. standing real close to people with eyes and ears wide open

We all know the tale of the man who investigated the rust on the railroad tracks to determine the frequency of shipments from a manufacturing facility. That's creative and interesting, though it unfortunately doesn't map too closely to any of my own informational needs and client interests.

However, attending a conference or tradeshow and listening to key figures engage in public discourse with others is very interesting. Stop by the booth and listen to what they are saying. Stand by the stage following the presentation and listen to what they are talking about in one-on-one dialogue. Use these findings to formulate better questions, to augment current findings and observations, or to satisfy other curiosities.

Be an observer, not a bothersome eavesdropper, because there is a genuine difference. Do not engage in duplicitous conversation monitoring, and do not intrude on conversation. Simply become a better, more astute event witness, participant, and observer.

Another variation on this is participation in teleconferences and web conferences. For example, if you are a shareholder, you might be entitled to listen in on many investor communications and analyst presentations. Contact Investor Relations at your target firm of interest for more information regarding accessibility.

### **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.

These resources present an interesting conundrum. 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. As I stated earlier in part one, 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.

As mentioned in earlier columns, please feel free to send an email if you have questions or comments: [contact@clew.us](mailto:contact@clew.us)

### **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](http://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. 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).

*scip.online*, number 45, December 23, 2003.

Copyright Society of Competitive Intelligence Professionals [www.scip.org](http://www.scip.org)

Powered by [IMN™](#)