

WHAT SOURCES DO WHEN THEY'RE NOT TALKING TO YOU

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I don't want to work, I want to bang on the drum all day.

– Todd Rundgren

I bought an enlightening book for my boys a long time ago called *What Do People Do All Day?* by Richard Scarry. It has no story, only pages full of cute little pictures and job titles, a great way to edify children and introduce them to the ideas that—

- Most adults work for a living.
- Other jobs are way easier to understand than competitive intelligence.
- Adults seem to wear solid colors and might be around the same size.

What does this have to do with you? If you care about your human sources, put this into an adult perspective. The ability to understand exactly what people do for a living improves your ability to connect, build rapport, and communicate whether you're soliciting opinion leaders or eliciting information. Individuals focused on primary research must not work with baseless assumptions about vocational nomenclature. In plain language, don't pretend to know everything.

This is critical in a marketplace that spawns dozens of functional permutations each and every year. From the evolution of personnel manager to vice president of talent, data center manager to chief information officer, or lawyer to chief compliance officer, dozens of new variations require regularly scheduled brain dumps. Many new ways to get paid emerge from social or corporate agendas, such as homeland security or corporate privacy

and governance (think Sarbanes Oxley or bioethics).

In the past few years, labor market economists have discussed the dire need for a totally new industry to emerge as a source of future job creation to supplant information technology, which succeeded aerospace, which followed the birth of the automotive industry – long after the stick-and-mud hut boom time (and so on). Researchers must keep tabs on what types of roles emerge from these unexampled industries, from new energy to nanotechnology.

BENCHMARKING AND INTERPRETING FUNCTIONAL ROLES

There is great value in performing the mundane task of confirming what you believe you already know. This might read as a waste of time, but cementing your research goals as defined by “what a source will know” or “who a source will know” is a research building block. Remember one of the fundamental principles of research: you do not need to know everything, you must only understand – that is, you don't need to be a chief financial officer to engage a chief financial officer. Several common approaches to developing crystal clear comprehension fall loosely into the following areas:

Your organization

Whether you are a corporation or a vendor, if your organization has ever developed a similar role or supported such a role through client relationships, take a look at existing information. This option might not exist for all researchers, particularly those in very small firms.



Job listings and resume databases

These resources are infinite, from major hubs like Monster.com, niche sites, and newfangled job aggregators like SimplyHired.com to trade publications and your own internal resume databases. Also include in the short list the career postings of any target organization or relevant competitor. Consider comparing descriptions from different firms to ensure that you do not confuse the nature of a role; identical titles are shared from industry to industry and “associates” doing analysis at one firm might only be getting doughnuts at another.

Conversation

The topic of networking on- and offline is its own tired subject, but you might already have a relationship with somebody who can debrief you on any functional discipline. This includes internal and external peers, friends, neighbors, family, and others. And never rule out your university's alumni database, which is full of folks who might be quite comfortable taking a quick phone call from you.

Legislation

When it comes to using government- or trade association-related job descriptions, focus efforts only on those roles that are created, revised, or otherwise altered as a result of changes to laws or industry regulations. For example, changes in homeland security, Security and Exchange Commission compliance, Food and Drug Administration rules, and import and export governance all spawned new roles. For all, core elements of these jobs were clearly spelled out within official public documents.

HOW WORKING PEOPLE FIT IN TO THEIR ORGANIZATIONS

There are two ways to understand how people fit in after getting hired and who takes charge if they get fired. The first revolves around traditional reporting structures, and the second examines how groups form on the basis of communication behavior (such as intradepartmental project teams). Researchers must pay close attention to where a person fits in because this drives source prioritization according to who and what a source knows. For example, source mapping for your project might involve thinking about questions that anchor not to a source's apparent role, but rather to unofficial duties understood only by seeing spontaneous and ad hoc communication networks.

Understanding a competitor's organization is not only a milestone in research execution, but also a veritable goldmine during analysis. Understanding how an organization is structured makes it easier for seasoned researchers to see where emphasis is being placed, from a product to a country to a function. This helps to illuminate trends and shifts before they become common knowledge.

GENERAL ROLES AND FUNCTIONS

No organization is beyond basic comprehension. Even the largest employers in the world follow a traditional approach, from Merck to Wal-Mart, as do all of those firms delivering seemingly incomprehensible products and services. There are directors, executives, managers of all levels and types, individual contributors, and administrative personnel, along with an assortment of outside parties or vendors performing similar duties as dictated by the needs of the firm (shipping, production, creative, and so on).

Understanding what to look for when mapping sources within an organization is governed by both

common sense and domain knowledge. Once you understand clearly what a source does for a living and how those skills might be leveraged by other departments or other organizations, you can begin to see how elegance of imagination can greatly affect the organic growth of your source universe. This is particularly valuable if, for example, you need to track down specific former employees according to responsibility, such as a former pharmaceutical research and development engineer now working in a strategy consulting firm – or when dealing with any seemingly finite source universe.

One great way to understand how an industry or market classifies primary functions is to examine subscription-based offerings incorporating standard subscriber data forms. By this, researchers should be thinking about those little check-box applications we all see in magazines, association membership applications, or other similar documents that clearly list the titles and functions most common to the industry.

Depending on a target organization's maturity, specific titles may or may not exist. For example, an early stage technology firm might function without any real sales organization, although they continue to sell to new customers. Imagine the impact when engaging a startup engineer who clearly understands the buyers in his market and as a result can accurately provide sales-oriented insights in the absence of any real salespeople. Again, this is about common sense. Ask yourself who else might know enough about the product to sell to outsiders.

As organizations mature, a common presence of several core functions will support operations. These areas are easiest to understand by thinking about the basic actions of any organization (see sidebar).

The Conference Board, a major nonprofit organization dedicated to corporate advancement, maintains

an extensive database and repository of sample organization charts sorted by industry and department. This information is available to members and nonmembers (for a fee). The information is submitted directly by participating organizations and all data sets are updated annually.

If you don't want to part with money to view samples, consider running a brief series of online searches for organizational charts by company type (such as software, pharmaceutical), industry, geography, or function. You'll be surprised by the deluge of information you find. To get insight into the structure of your industry's own model, examine the filings of any major publicly held firm, which detail information surrounding core functions and operations. This is typically in the 10k filing or within an S1, although it also might be detailed in acquisition-related filings (or other notable transactions).

INDUSTRY SPECIFIC ROLES

Beyond the major categories above, each organization develops industry-specific roles to address both the market and the overall need. For a manufacturer, these might map to labor relations, and for a conglomerate these might deal with specific country operations. Within any market or company, variation by title will become perplexing if you have not developed basic knowledge of what the firm might at least be expected to look like.

Getting a rich understanding of a source before engaging in dialogue requires cognition of several basic elements, including the role, the organization, and the marketplace. This sounds a bit obvious, but it calls up an earlier point about the value of taking the time to build this understanding from day one – even if you are certain you already know it all. This should help you avoid looking for individuals by title who might not even exist or who might exist only by location within communication networks.

SIDEBAR: CORE FUNCTIONS

- **Lead:** executive leadership, including both voting and nonvoting boards and councils (those with fiduciary responsibilities, technical advisors, or occasional customer councils).
- **Operate:** all areas of ongoing control and production, from any employee providing oversight all the way out to the individuals managing the operations of products, plants, or services.
- **Account:** financial management and controls at all levels, from chief financial officer to bookkeeper.
- **Develop:** development and creation, including creation of products, services, or any offering. This includes everything from the people who dream up whatever the company sells to the people who make it come to life.
- **Employ and administer:** human resources and any associated administration, from contractor to chief people officer to labor relations.
- **Sell:** all of sales and business development, from direct sales to fundraising to business development at all levels.
- **Service:** support and all areas of ongoing interaction between the organization and customers or relevant outsiders.
- **Market and communicate:** all marketing and communications, from marketing departments to broadcast channels, including telephone and events, direct mail, or blimps flying over football games. This also touches on the associated creative services departments as well as outward-facing groups like public relations.

Most seasoned research professionals can infer and describe what most sources do for a living as well as detail how such sources fit into their organizations. This mental asset is typically rooted in years of validated assumptions and answers to well-formulated questions. But these very same competitive intelligence veterans are sometimes caught with their pants down when surprises surface about what their potential “best sources” actually know. People in business don’t enjoy surprises.

Asking questions and getting answers is what research is all about. By continuously fact-checking and understanding exactly how an organization works and what functions mean to that firm, it becomes much easier to stand behind the edited and printed final findings. The alternative is to make calls or poke around looking for somebody to talk to, but sloppy source research begets inefficient project execution and invites ethical quandaries when backs are pushed to the wall in an effort to nail down human sources.

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