

# The Making of A CI Professional The SLA CI Division Mentoring Program

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## What Is A Business CI Professional?

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- An expert on one or more markets or industries devoted to tracking, researching, gathering, analyzing and forecasting competitive developments. The goal is to deliver findings that are generally provided either proactively or in response to the needs of the executive, strategy, product development and management, sales and/or marketing organizations of a company
- Someone specifically tasked to perform the definition of competitive intelligence **as defined** by his or her company

# Typical CI/MI Organizational Focus

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## Key Priorities

- High quality actionable market intelligence
- Support Strategic Planning, New Business Development and Product Management
- Offer tactical sales support to help the sales team achieve success
- Offer a variety of targeted services that are both responsive and proactive
- ***Transform Data To Action***

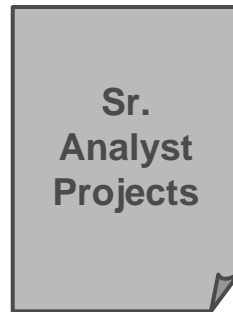
## Core Competency Requirements

- CI skills with a mix of quantitative and qualitative strength
- Strong knowledge across all target markets
- Ability to assess large volumes of data and develop analysis based on a variety of frameworks and formats
- Expert communication skills
- A mix of specializations
  - Information research techniques
  - Financial analysis
  - Quantitative consultant skills (e.g., market sizing and forecasting)
  - Excellent writing and presentation skills needed to create newsletters, presentations, white papers and special projects

# Market Intelligence: Value Added Services Drive Action



- Facts and Summaries
- Tear Sheets
  - Industry/Market Scans
  - Bio's
  - Expert Searches
  - Ad Hoc Inquiries
  - Fact-based Responses
  - Alerts



- Analysis
- TS Market Authority Files
  - Competitive Assessments
  - Deep Dive MI
  - FECS
  - President's Report
  - Market Research
  - Presentations
  - Newsletter
  - Impact Alerts



- Executive Services
- Analyst Outreach
  - Go-to for market views
  - Special Requests
  - Executive Meetings
  - Trusted Advisor
    - Opinions
    - Project Readouts
    - Impact Assessments

The Market



# Typical Items To Be Tracked

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- **Competitor Capabilities, Plans, Intentions**
  - New Product Launches
  - R&D Trends
  - Financial Analysis
- **Markets and Customers**
  - Financial Performance Trends
  - Customer Issues
  - Key people
- **Industry Structure and Trends**
  - Mergers, Acquisitions, Exec. Changes
- **Political, Economic and Social Forces**
  - Government Regulations
  - Societal Shifts
- **Technology Developments and Impacts**



## CI Practitioner Attributes

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- A mix of specialized vertical market knowledge coupled with a solid CI foundation including:
  - Research expertise
  - Analytical expertise
  - Excellent communications skills (writing, presenting and defending key concepts)
  - Overall business acumen
  - Technology expertise
  - Financial expertise
  - Networking skills
  - Interviewing skills
  - Ability to grasp key concepts quickly
  - Ability to interact with various levels of expertise

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## **WAIT:** How Can Any One Person Be All That



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**Relax:** Not too many people are!



## Which Means:

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- There is no one model of a CI Professional
- CI is a very eclectic set of skills and capabilities
- CI teams generally include various types of experts
  - Small teams rely on a network of experts
- Each CI position includes a specific set of required skills based on the particular challenge the specific position is responsible to deliver
- CI works best when it stimulates a “culture” based on a network dedicated to sharing information and views

## Why are Librarians So Involved?

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- The cornerstone of intelligence is valid information
- Librarians may deploy their expert research skills in a variety of CI roles
- Multi-faceted teams rely on expert searches
- Librarians may use their skills to enter the profession and build-out their career options around other typical attributes such as:
  - Attention to detail
  - Ability to cite specific data points accurately
  - Intellectual curiosity
  - Love of learning
  - Specific subject knowledge

# Typical Challenges Faced By Librarians Who Have Just Switched To CI Units

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- Dealing with the demands of executives
- Managing expectations of users who may be under extreme pressure (*critical business objectives*)
- Time management (*how do you manage workflow?*)
- Dealing with organizational dynamics (*a.k.a. internal politics*)
- Not all users are equal (*i.e., don't put the CEO in a queue*)
- Expanding knowledge base to get closer to business imperatives
- Distilling actionable findings from huge volumes of data
- Communicating results expertly in various modes
- Making recommendations
- Intense travel

# How does a Librarian Become A CI Professional

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- My first CI Experience
  - Enjoying Street & Smith's Annual Baseball Yearbook (circa age 11) as I was deeply into the analysis of baseball teams as compared to the NY Yankees
- My First Professional Aspiration
  - Professional Musician (Flautist)
  - Relevance to CI career: I was a competitor with a strategy
- My Return To School Following My Lack of an Income Derived from my Musician Phase
  - MLS provided a great foundation to build upon
- My Information Jobs: Medical and Engineering Librarian
  - Relevance to CI Career: Engineering job required me to participate in bids for government jobs (I managed a project archive that needed to be selectively used for new bids)

## So How Did It Happen?

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- I had a vision of a career opportunity that would involve doing business research for a large company
- A company called Bellcore (1984) advertised for: ***“Librarians seeking to apply their skills to the role of information professionals working outside of a traditional library and directly with business experts”***
- I applied for the job
- I got one of the 10 or so open positions

## My Career Path To CI: Evolved Over Time

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- Extensive research experience devoted to serving clients by providing results based on fact-based information about competitors, technology innovation and customer needs
- I progressed to management roles responsible for adding an analytical component to the fact-based deliverables
  - Built a Research Analysis Team
- Grasped opportunities to become the Cable Industry Analyst
- Moved out of the Info Center into Market and Competitive Analyst Roles
- Eventually moved to what is currently the Scientific business of Thomson Reuters as Director, and now VP of Market Intelligence

# Key People Who Aided My Development

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- There were several times when I needed the guidance and support of someone I looked up to. Some key role models
  - **Dorrie**
    - Who taught me to try, but more importantly to “do”
  - **Karl**
    - The tough engineer who made a pact with me that we would both move into expanded roles within 6 months (We both fulfilled our end of the bargain)
  - **Stanley**
    - An elder statesman who was an expert in building international businesses
    - I’ll never forget his interest, support and guidance
  - **Steve**
    - The veteran of the Bell System who led me to reach beyond my initial success
  - **Karen and Jim**
    - Two outstanding outplacement counselors who helped me overcome the results of a corporate downsizing
  - **Shahir**
    - Who helped me learn how to interact with C-levels
  - **Kevin**
    - My current boss who has inspired me to take my skills to the next level

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***I've honestly come a long way since the time I began my career as a librarian. The path I was able to follow was inspired and guided by several remarkable individuals who have been my role models. However, I never really had a mentor who helped me to plot my course. Although the journey has proven successful I often wonder how much more smoothly it would have been had I worked with a mentor.***

# What is a Mentor?

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## Some Definitions

- A wise and trusted counselor or teacher
- To serve as a trusted counselor or teacher, especially in occupational settings
- To serve as a trusted counselor or teacher to another person

## Greek Mythology

- Odysseus's trusted counselor in whose guise Athena became the guardian and teacher of Telemachus

## In the Business Environment

- Guide
- Coach
- Sounding board
- Supportive friend
- Wise person
- Role model
- Facilitator
- Resource
- Objective thinker
- Experienced ally
- Sage

## Some Guiding Principles:

- A mentor will build a relationship with a “mentee” that is supportive, realistic and encouraging.
- A mentor can introduce new areas of knowledge to a mentee by focusing on agreed upon goals
- The mentor will aim to find answers by drawing on a bank of professional experience, resources and contacts

# The Role of a Mentor

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- Motivates the mentee
- Organizational mentoring programs often focus on team dynamics
- Providing feedback is an essential aspect of the role
- Objectively presents problem solving frameworks and scenarios
- May suggest a network of contacts
- Offers “common sense” advice
- Challenges the mentee to move ahead
- Remains available to follow-through
- Could provide the logic that would avoid a negative outcome to a difficult situation

## The Psychology of Mentoring

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- Provides a way to share knowledge and experience
- Offers a channel to “pay back” to the system by increasing the potential for someone else’s success
- Offers personal satisfaction
- Permits access to a network of ripe with potential skills and competencies
- Is all about commitment

# Challenges

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- Finding time to fulfill the commitment
- Should the mentor be trained?
- Potential misuse of the role
- Ego trips
- Poor communication skills
- Established guidelines should be set
- Accountability issues
- Possible conflict of interests
- Sustaining the relationship may be difficult
- Falling into the trap of “too much empathy”

# Setting Up The SLA CI Mentoring Program

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## First Steps

- Creating a plan
- Establishing guidelines
- Performing a trial run
- Devising a communications program

## Next Steps

- Implement the formal program
- Build a pool of mentors able to work with mentees
- Identify mentees and match them with the appropriate mentor
- Provide a tracking system to determine progress

## Long-Term Potential

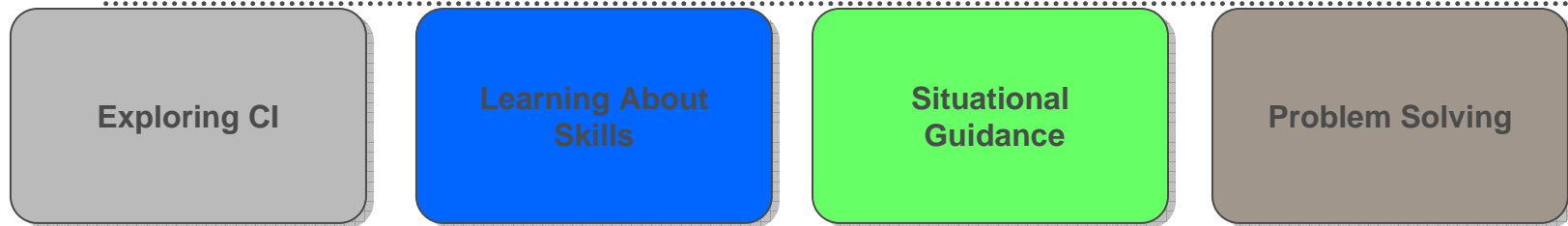
- The SLA CI Chapter will help increase the knowledge and potential for SLA members to understand the requirements, benefits and satisfaction of embracing CI
- CI Practitioners will benefit either as mentors or mentees
- SLA information professionals will improve their ability to implement added or full-scale CI services

Done

Next

Goals

# Potential Mentoring Tracks



- What's CI
- How to's
- Learning about courses and training programs
- Career pathing
- CI and the Info Pro

- CI techniques
- Presentation tips
- Tips about Sources
- Successful techniques
- How to build a network
- Brainstorming frameworks

- Creating Buzz
- Ways to communicate value of CI to execs
- Do's and don'ts
- Discussing organizational structures and dynamics

- Informal talks about ways to resolve problems
- Sanity checks
- Informal peer-review of ideas

## Common Outcomes

A set of issues, challenges and opportunities will be fleshed-out and evaluated in an informal setting that will lead to improved awareness and help achieve successful outcomes

# Roles and Responsibilities

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## Mentors

- Commit 2 – 4 hours per month
- Connect with mentee
- Establish game plan
- Reach agreement with mentee to establish goals

## Mentees

- Commit 2 – 4 hours per month
- Present reasonable needs
- Follow-through on suggestions
- Report observations to committee

## CI Team Leadership

- Endorse the program
- Oversee progress
- Evaluate results
- Consider resource needs
- Provide communications tools (listserv, news articles, etc.)

## Conclusion

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- The CI Division is poised to implement a mentoring program that will offer strong value to interested members
- In order to succeed we'll need you to participate either as a mentor or mentee
- This program will increase the capabilities of the Division to offer services that will impact the ability of members to make progress in their careers and to strive for targeted roles within the CI profession

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Thank your for attending my presentation

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Scientific

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