



**TO:** SCIP Members  
**FROM:** Martha Matteo, Ph.D., 2008 Nominating Committee Chair

### **Congratulations Candidates!**

On behalf of the 2008 SCIP Nominating Committee, consisting of Babette Bensoussan, Craig Fleisher, Jody Holtzman, Arik Johnson, Mark Little, Rainer Michaeli, and Roberta Piccoli, I am pleased to inform you that seven outstanding candidates have been confirmed for the upcoming SCIP Board of Directors election. By the direction of the SCIP Board and guided by the Society's bylaws, the general membership will select the final three candidates who will serve a three-year term, beginning January 1, 2009.

The 2008 slate of candidates includes:

- Adrian Alvarez – Midas Consulting – Argentina
- Claudia Clayton – ViewPoint – US
- Erik Glitman – Fletcher/CSI – US
- Donna Hawryliw – Erie Insurance Group – US
- Yoshio Sugasawa – Nihon University – Japan
- Jens Thieme – Ciba Inc. – Switzerland
- Todd Welda – Whirlpool Corporation - US

Information about each candidate and their responses to questions from the Nominating Committee follow.

On-line ballots for the election will be available for the SCIP membership October 28-November 14, 2008. All SCIP regular, group, and life members in good standing have the privilege, and I would also add responsibility, of voting in this important election. The convenient, secure, web-based voting process will only take a couple minutes at most. Results of the election will be announced within two weeks following the closing date of the voting.

We applaud and appreciate the candidates' willingness to volunteer their valuable time and energy to SCIP and the CI profession and wish each "good luck" during the election.

## 2008 SCIP Board of Directors Slate of Candidates & their Responses to Questions

### Adrian Alvarez - Argentina

- Consultant – Midas Consulting (founding partner)
- SCIP member since: 2005
- CI involvement: leading competitive intelligence, strategic analysis, management consulting projects throughout Latin America, Spain and Portugal. Sector include: financial, telecommunications, health care, retailing, education, consumer goods and manufacturing. Teaches postgraduate courses in CI in Argentina. Authored articles in Latin America, Brazil, and Spain.
- SCIP activities: Membership Advisory Committee (2007), Editorial Advisory Board (CIM) since 2007, has authored articles for CIM, speaker at SCIP events. Head of steering committee to form SCIP affiliate in Argentina.
- BA in Marketing, post-grad in Finance

### Adrian Alvarez's responses to questions:

1. **What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?**

*There are two important problems SCIP is facing:*

- 1) *The financial crisis will become international and have its effect on the number of SCIP members and conference attendance, as companies will probably cut expenditures that do not give an immediate payback, such as SCIP*
- 2) *There is a threat coming in the international community, as international members are not getting enough value from its membership and local societies are being better able to provide local practitioners with training and events that cover their needs.*

*My ideas to address these issues are:*

- 1) *My impression is that most of the training program where SCIP gets most of its revenues is tailored to the needs of the recent entrant to the profession. People with more years in the profession have less offering but, I would say, the same need for learning. The offering for these persons must be "immediately" applicable and "tailor made" to their industries. I believe SCIP has knowledge to act on both immediate applicability and tailor made solutions, at least for the largest markets, such as pharmaceuticals, finance, manufacturing or telecommunications. This offering will serve to both, increase training revenues and also reduce the churn rate of members.*
- 2) *In the case of the international community is to offer more value through on-line events catering the special needs of the international community. Offering a clear path to become an affiliate/chapter and education package and are other things that could be done.*

2. **Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.**

*First and foremost SCIP has to support the development of affiliates/chapters abroad. The number of foreign affiliates we have is, at the moment, minimal.*

*There are two steps I consider to be of fundamental importance to help in this process:*

1) *Support the development of a pilot affiliate/chapter to learn from the process and then make replications easier around the world. Having a successful affiliate will allow the expansion abroad to have both board support and the support on the ground in the countries where this can be implemented.*

2) *A partnership with other CI foreign societies should be sought, as there are some other societies abroad, such as ABRAIC in Brazil, which are already established and have similar objectives to SCIP. I believe that this can be and should be done, as cooperation will benefit both SCIP and the foreign association.*

*I believe that being an international member who can speak four languages fluently and also having strong ties to the international CI community, I can play a role for making SCIP a more global society.*

**1. Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?**

*I want to be a member of the board because I believe I can serve SCIP well with the experience I obtained over the years, as a practitioner, academic and former member of the Membership Advisory Committee. Informally, I also many times advised several board members on issues about the international community and I believe that the time has come to play a more important role in SCIP.*

*My qualifications for the job are:*

- 1) *I have been on the board of another association, know how associations work and even worked for SCIP at international and committee level.*
- 2) *I represent three different constituencies (academia, consultancy and international members) at the same time and can understand their different points of view as I am part of them on a daily basis. I am also in close contact with people working as practitioners at companies and know their needs.*
- 3) *I demonstrated my commitment to SCIP by organizing 18 events in Argentina, being two times selected as a speaker for SCIP international conferences and also authoring three articles and another one to be published soon at Competitive Intelligence Magazine.*

*Additionally, I speak four languages fluently (English, German, Spanish and Portuguese), which means that I can communicate with a large number of SCIP members in their own language and understand their points of view from their own mindsets.*

**Claudia Clayton – US**

- Consultant – ViewPoint (managing director)
- CI involvement: strategy and market intelligence for Fortune 100 corporations and specialized organization that are the leading player in their respective niche markets.
- SCIP activities: Education Advisory Committee (current chair), SCIP09 Program Committee, member of the Women’s Leadership Council, co-chair Central Virginia Chapter, Catalyst Recipient (2007), authored article in CIM and speaker at SCIP events.
- BA in Public Policy

## **Claudia Clayton's responses to questions:**

- 1. *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

SCIP faces several issues that need to be addressed by the board in the next three years. These include expanding the organization's awareness and membership,, creating an international organization and driving educational opportunities for competitive intelligence. Specific initiatives around these three objectives need to be developed with action plans. As a board member, I would want to see an increased emphasis on outreach and impact goals where SCIP becomes better known and where competitive intelligence as a business discipline is promoted. This would expand membership and association revenues so that the group can deliver more value and services to its members. A high quality, expanded education program needs to be delivered along with certification that embraces quality education provided by the member community. International SCIP should not be considered a separate objective but an integrated and integral part of the association.

- 2. *Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.***

International representation should be part of all board, committee and events planning. US members will have difficulty thinking of ways that we can serve the International community without this participation. Providing more distance learning will extend educational opportunities to the international membership. The international community should also be tapped to help educate CI managers in the US about opportunities in other countries through webinars, etc.

- 3. *Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?***

Board membership will provide me with an opportunity to continue increasing the scope of the association in terms of helping to develop awareness and utilization of CI in business, enhancing education and training, and building greater value for the membership. My qualifications include a willingness to devote time and energy to SCIP plans and programs, my experience in marketing and development prior to entering the field of competitive intelligence, and my expertise in serving on the boards of other business organizations. SCIP needs a market focus to attract members and needs a quality product to retain them. I believe I can assist the very dedicated current board and SCIP volunteers to make that happen.

## **Erik Glitman – US**

- Consultant – Fletcher/CSI (founder and managing director, also serves as Director of Global Operations, Research and Strategy)
- CI involvement: Over 25 years in CI in areas such as automotive, electronics, healthcare, IT, kitchenware, machinery, pharmaceuticals, and telecommunications to help clients gain competitive advantage in the marketplace through the integration of qualitative and quantitative CI collected from global sources. Fletcher/CSI operates with 22 affiliate offices world-wide. Is adjunct instructor on global competitive intelligence.
- SCIP activities: Awards Committee (chair), and has authored articles in CIM, speaker at SCIP events (domestically and internationally).
- BS degrees in Economics, and Environmental Studies, and MS in International Affairs

**Erik Glitman's responses to questions:**

**1) *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

Over the next three years, SCIP will face three major challenges which will define the association for the future.

The first is a growing international membership which will require that SCIP address the differences in CI culture and methodology around the world. Adapting SCIP membership benefits, growing the association's international outreach, and incorporating international perspective will be essential to manage the globalization of SCIP. Integrating an international perspective to SCIP events will reinforce the multinational nature of SCIP and allow for greater educational and experience exchange between all members.

The second is continued high member turnover which saps the association of its core memory and experience base. SCIP can work to increase the tenure of members by offering educational and networking interest tracks that match the changing needs of members as they move from newcomer to experienced professional. These tracks will need volunteer efforts, which will be used to further keep the longer term members involved in SCIP and reduce turnover.

The third is the value proposition of SCIP. As members become more established in the field of CI, there is a greater need to provide them with a higher return on their time and investments in SCIP. Maintaining the overall value of SCIP to members by holding down fee increases, increasing low cost offers for member education, and providing more frequent networking opportunities during SCIP events will be steps that can keep the member value proposition high.

**2) *Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.***

SCIP is growing internationally and needs to manage that growth to insure that new members receive value for their investment. This will require continually adding educational opportunities that reflect the CI culture and methodologies used in different regions and nations. It will also require that opportunities for interaction between international members to facilitate the exchange of CI tools, methodologies, and ethics. Establishing national or regional chapters as the core of international growth will allow SCIP to target geographies where CI interest is highest and build the organization in a controlled manner. Working with existing international members and chapters to facilitate that growth will also ease the integration of new international members.

**3) *Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?***

I have been active in SCIP since its inception, was present at the first annual meeting and have been a member since 1990. In that time I have seen SCIP grow and change, becoming more professional and adapting to meet member needs. I have contributed to the SCIP magazine with a regular column. Through this contribution I have shared my experience and have received encouraging feedback from members. In the past year that I have participated in member in volunteer activities as chair the awards committee. Working with board members and fellow volunteers has provided me with insight into the duties and functions of the board while showing me how my participation can help guide and support SCIP as it continues its mission to members. Three characteristics that distinguish me for board service are:

- Experience. I have been active in SCIP for over 20 years as a member and can bring that experience to supporting SCIP as it grows, providing direct feedback on what keeps members active and how to increase member tenure
- International sensitivity. Through multinational CI project management and speaking engagements, I have developed lasting relationships with CI professionals of different cultural backgrounds. I will bring this sensitivity to my tenure, helping guide SCIP as global membership grows.
- Business acumen. I have run a CI consulting firm for 20 years. Running a small business gives me direct experience in managing organizations and controlling costs. This experience will be helpful when evaluating SCIP's financial position.

### **Donna Hawryliw – US**

- Practitioner – Erie Insurance Group (supervisor of insurance operations research and market research department)
- CI involvement: Launched Erie Insurance's first corporate CI program. Supervises staff in CI and customer intelligence/research efforts and supports strategy development. Led corporate planning for Erie's communications department.
- SCIP activities: SCIP08 conference chair; SCIP09 Planning Committee, SCIP07 Planning Committee; SCIP BOK Task Force (2007)
- BA in Anthropology, and MBA

### **Donna Hawryliw's responses to questions:**

**1. *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

Expanding the membership base on a global basis and re-engaging current membership will need to remain key focus areas for SCIP for sustainability and growth. We need to find ways to keep current members engaged and continue to offer multi-year members benefit and values that keep them tied to SCIP and see the value in membership.

For long term members this means finding new opportunities, as well as higher level educational offerings that are new and different. SCIP needs to look at delivering new content at annual conferences as well and balancing the amount of beginner and intermediate level offerings to continue attracting new members. We must recognize that although our continued growth comes from new membership, the sustainability of SCIP comes from our long-term members that see the value in our educational offerings and networking opportunities. These are often SCIP's biggest advocates.

Since 2007 I have been involved in SCIP's Body of Knowledge team to address the various educational needs of the members and future members, including whether certification in competitive intelligence has value. This may also help with membership growth as we move forward.

Additionally, steps to expand membership on a global basis are important as well and I feel that there are several opportunities that I can help SCIP take advantage of, including tapping into some other professional groups that would find value in the CI skill set and further promoting the profession to encourage such growth.

**2. *Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.***

Various strategies need to be put in place to ensure that SCIP has more of a global presence and a global membership base. A strategic plan should be developed outlining activities for the next three to five years that would increase SCIP's exposure in the

global community, as well as increase the global business community's understanding of competitive intelligence.

Additionally, other professional groups stand to benefit from the CI skill set and we need to promote to them as well. Exhibiting at trade shows or annual conferences of groups with membership bases that could employ an intelligence skill set could result in an increase of membership both domestically and internationally. SCIP also needs to do research to learn what professions existing members held prior to entering the intelligence field—this may give us some idea of where to market for new membership.

We can also explore the feasibility of developing an incentive program for existing SCIP members that refer international colleagues or co-workers for SCIP membership. We may choose to offer the new or existing member, or perhaps both, discounted membership rates or even a discounted annual conference rate or training program of their choice once their membership has been paid in full.

Other options would be necessary and a multi-year communication plan would be a necessity to maintain proper exposure for the organization and the intelligence community.

**3. *Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?***

I believe in giving back to the organizations that have helped you along the way. SCIP provided the information and training that I needed to develop and launch my company's first formal competitive intelligence program. It seemed like a daunting task at first for a lone researcher. The program has evolved over the years and we have continued our training and networking through SCIP, continuing to find benefit in membership. I hope to help give back to that same community that helped get me started so many years ago.

Three things that distinguish me for consideration as a board member are dedication, experience and determination.

I am dedicated to SCIP and its mission and values. I was the chairperson for the 2008 annual conference in San Diego, leading the year long planning efforts to pull together a very successful event. I also participated on the planning team for SCIP07 and am involved in SCIP09 as well as Body of Knowledge task force since 2007. I look forward to joining WLC in 2009.

I have extensive experience in strategic planning, seeing the big picture and want to help shape what SCIP can be in the years to come, as well as what it can do for members today. I have experience on board of directors and fundraising on the state and local levels.

Above all else, I believe that you accomplish nothing without determination. Applied together, I believe that these characteristics can work to the benefit of SCIP and its membership.

## **Yoshio Sugasawa, D.E., - Japan**

- Academic – Nihon University (professor and chairman of technology management and intelligence graduate school of business). Co-founder and director of the Japan Tech Infrastructure and Incubation, Inc (Calif)
- CI involvement: experienced researcher, lecturer, and author in technological innovation & commercialization, competitive analysis, industrial technology, and competitive technical intelligence.
- SCIP activities: Japan Society of Competitive Intelligence (president); author of articles in JCIM.
- BS in Industrial Management, MS in Information Theory, Doctor of Engineering. He has been educated in Japan and California

### **Yoshio Sugasawa's responses to questions:**

**1. *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

I believe that making SCIP into a more global Society is one of its most important issues currently. Although some of its members, including some on the Board, come from outside the US, the organization still remains America-centric. More participation from people from outside the US in SCIP US activities, the establishment of more foreign branches of SCIP, and the promotion of further international contributions to our journal are all critical for the exchange of information and new knowledge creation in the field of competitive intelligence.

Another issue is the lack of new membership in general, even on the US side. Although over time membership has expanded from primarily "information profession" members to include people in management, strategic planning, marketing and R&D, "competitive intelligence" is still regarded as a rather specialized function. Perhaps the key for casting a wider net is to position "intelligence" more as a basic management skill, alongside skills like "leadership," that should be learned by all managers, managers-to-be, and students of business. One way to achieve this might be to work with more MBA programs globally, as well as with training organizations worldwide, to help codevelop and offer more courses in competitive intelligence. Those who take such training would be more likely to want to further their knowledge by joining SCIP.

**2. *Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.***

The steps I would take to make SCIP more global are mentioned in the item above.

**3. *Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?***

I believe I can help SCIP in its globalization efforts in the ways mentioned above precisely because, as head of SCIP Japan, I am currently spearheading the effort here to promote SCIP's activities as well as cooperate with other such efforts in the Asian region, which is still underrepresented in SCIP. As an academic in a business school I am positioned to coordinate efforts both for intelligence research within academia and its dissemination to and application in the business world. Beyond my contacts in Asia, I also work extensively with intelligence professionals and academics in Europe as well as the US. Finally, my specialty is Japanese technology intelligence, an area which may be of increasing interest to SCIP members.

## **Jens Thieme – Germany**

- Practitioner – Ciba Inc., Basel, Switzerland (global head of market & competitive intelligence, Marketing & Sales Office, global headquarters)
- CI involvement: development and implementation of global intelligence function for improved marketing and sales excellence, intelligence strategies, sourcing processes, electronic dissemination, intelligence techniques, corporate web site development, Intranets and electronic publications, e-marketing, e-business. Author and presenter in Germany, Switzerland, and US. Founding member and board member of Swiss Competitive Intelligence Association (SCIA)
- SCIP activities: Authored chapter in CIF's Starting a CI Function, presenter at SCIP events, European Summit Planning Committee (2008).
- Graduated from the Polytechnische Oberschule, East Germany, and has completed business education and apprenticeships in metal worker engineering, and retail sales.

### **Jens Thieme's responses to questions:**

**1. *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

A1: Increasing travel cost and expenditure consciousness due to rising prices and economic slowdown will reduce classical networking opportunities. Also CI practitioners continue to struggle with recognition of the discipline within their own organizational environments and outside as clear career paths remain exceptions.

I envision to deploy and nurture modern technologies such as video conferencing and interactive online learning combined with interlinked online collaboration features. SCIP should extend networking facilities to formats that resemble what has been offered successfully during summits and chapter events towards lively online learning and sharing environments.

A SCIP Virtual University would offer professional education programs with certificates for the various CI sub disciplines, partly overlapping to related, classical business disciplines such as Strategy, Business Development, Marketing, R&D could offer the much needed edge in cross discipline recognition for CI practitioners and support their personal career developments.

I feel well suited to kick off such developments based on my professional experiences within a global corporate conglomerate.

**2. *Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.***

A2: Country champions in locations without SCIP organizations should be accessible for all SCIP members. These champions could assist in any membership and events topics as well as collect country-specific needs and specialties that should be fed back to the global SCIP organization. In preparation to global summits for instance such a country champion could compile a contribution of that country to the summit as a presentation or catalogue of member requests. Also group tariffs for collective travel to global or other events (e.g. neighboring SCIP organization) could be arranged.

If any of those country specific efforts grows beyond a certain size SCIP should offer active support to create and implement a local chapter or any other suitable form of local SCIP organization to the benefit of its members.

I would feel compelled to establish this concept of country champions throughout the world.

**2. *Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?***

A3: As a member of the board to the Swiss Competitive Intelligence Association, a published CI practitioner and active presenter to CI and marketing events I feel compelled to increase my assistance to the cause of an ever growing profession. Serving at the SCIP board provides the most intense and valuable opportunity to be at the heart of international CI professional's true requirements and support their individual activities and developments.

Characteristics: In my 4 years in sales management at a management assignment in the US I learned that the real challenge only starts after the first NO by a customer. So does the fun! I apply this principle to my daily eagerness to be part of sustainable solutions. Also I have learned throughout my various professional endeavors how to multiply contributions and performance of individuals to a mutual effort that provides strong team results and fun environments to perform in.

Colleagues and friends value my sense of urgency when required and my creative approach to find solutions and ways of fruitful and exciting collaboration.

**Todd Welda – US**

- Practitioner – Whirlpool Corporation (senior manager, cleaning category insights)
- CI involvement: More than 10 years experience providing leadership developing CI functions in the US and Europe, B2B and B2C sales and marketing, competitive product evaluation, external research, trade show activities, strategy management, project management, market and financial analysis, and education and training.
- SCIP activities: Presenter at SCIP events and author in SCIP publications. Currently co-teaches (CI 101/202). Has mentored a number of CI professional to help them develop their own CI career path.
- BA and MBA

**Todd Welda's responses to questions:**

**1. *What are the most important issues that SCIP and its membership face in the next three years? What ideas do you have to address these issues?***

Given the state of the US economy, companies are cutting cost and resources. This will challenge the CI professional's ability to add value over the next few years. As corporate resources are constrained, SCIP must demonstrate the ability to add value, not only with the membership, but with their companies as well. SCIP can give CI Managers the tools to demonstrate their teams' value within the company so they become critical to operations and are not as susceptible to budget and personnel cuts. In an economic down-turn CI becomes an important element of success.

SCIP can do a number of things to help the profession thru these tough economic conditions. Offering advanced education opportunities, especially during the SCIP Conference, will drive continued involvement of senior professionals who suffer from diminishing returns. By creating and enhancing greater opportunities for Senior CI professionals, SCIP can build a stronger membership for the future.

To support continuing development of CI professionals, SCIP needs to develop programs around sales and sales management skills. The majority of these skills are

directly applicable to CI professionals, not only when working with internal customers, but during research activities.

During the past three years, I have been mentoring several CI functions helping them develop CI functions, skills, and develop a track record of success. Based on feedback I have received to date, I would like to see the development of a Mentoring Program to better leverage this value across SCIP.

**2. Please share with SCIP's members any concrete steps you would undertake to make SCIP a more global society.**

Given that we are living in a time of uncertain economic conditions, leveraging ideas from around the globe could be one of the things that help secure your function in times of cost cutting.

There are several things that would help the flow of information on an international basis:

- I would like to see an international section during the US and European SCIP conferences focused on sharing the ways a variety of countries develop and manage their CI functions.
- I would like to offer a number of seats to SCIP courses to international participants free of charge. This would help encourage international participation in SCIP training classes globally. The T&E expenses would be close to the course costs allowing for greater international participation.
- When the Mentoring Program is established I would encourage international participation in the program allowing for international experience transfer.
- I would like to see the development of an International CI program that could be rolled out for deployment within the chapters during their meetings. Centrally developing the materials would leverage experience and the local delivery would help develop chapter capabilities.

**3. Why do you want to be a member of the SCIP board? Which three characteristics or qualifications distinguish you to serve as a board member?**

My current position has significantly less travel than previous CI positions allowing more time to get involved in activities that are personally satisfying such as mentoring other CI professionals, teaching CI 101 and CI 202, and being a Board Member for SCIP.

I have the unique mix of vision, diversity of experience and passion for CI that I will leverage to help lead SCIP through this tough business environment.

I am a current Competitive Intelligence practitioner having been involved in CI activities for over 10 years and have lead the development of three CI programs in companies operating with different business models (B2B, B2B2C and B2C). These programs have large and small, operating on a domestic and international level. I struggle with the same issues facing other Competitive Intelligence practitioners and therefore have a pulse on the issues and challenges facing our profession. I have attended SCIP events in the US and Europe and have performed CI operations in several countries around the world. The breadth of my experience in Marketing, Sales, Strategy and CI gives me a unique perspective that will generate exceptional value for SCIP and our membership.

Over the past 20 years, I have consistently been sought out by my peers for my expertise. My peers describe me as an excellent visionary with strong communication and interpersonal skills with a proven track record for increasing profits and strengthening competitive position.