



SCIP2010 WASHINGTON, D.C.

**2010 International
Annual Conference
& Exhibition**

March 9 -12, 2010

Washington Marriott Wardam Park

STRATEGIC PARTNER:



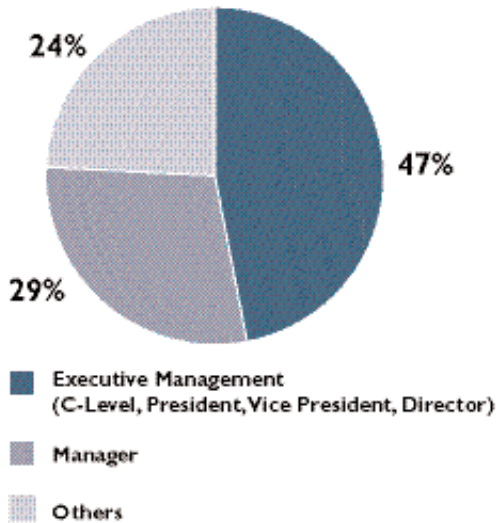
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“ THE EXPERIENCED TALENT THAT THIS EVENT ATTRACTS PROVIDES A UNIQUE NETWORKING EXPERIENCE THAT IS RICH AND EDUCATIONAL ” -MARTHA GLEASON
Director of Market Intelligence, Blue Cross and Blue Shield of Florida

PAST PARTICIPANT PROFILE



SNAPSHOT OF PAST PARTICIPANTS

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- Abbott Laboratories
- Aflac
- Air Products & Chemicals, Inc.
- Akzo Nobel Chemicals, Inc.
- Alcatel-Lucent
- Alcoa
- Allstate Insurance Company
- Amgen, Inc.
- Anthem Blue Cross Blue Shield
- Apple Computer, Inc.
- AstraZeneca Pharmaceuticals
- AT&T
- ATK Space Systems
- AutoTrader.com
- Avaya
- BAE Systems
- Barclays Capital
- BASF
- Battelle
- Batesville Casket
- Battelle Memorial Institute
- BAX Global
- Baxter Healthcare
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- Hill-Rom
- Honeywell
- Hughes Space & Communications
- IBM
- Intel
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- Merck
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- Owens Corning
- PetSmart, Inc.
- Pfizer
- Pharmacia Corporation
- Philips Healthcare
- Philips Medical Systems
- Pioneer Hi-Bred International Inc.
- Pizza Hut
- Procter & Gamble Corporation
- Prudential Retirement
- Qwest
- Raytheon
- Raytheon Professional Services
- RIM
- Roche Molecular Diagnostics
- Rockwell Collins, Inc
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- SAIC
- Sandia National Laboratories
- Sara Lee Food & Beverage
- Schneider Electric
- Sears, Roebuck and Co.
- Shell Chemicals
- Siemens Building Technologies
- Sony
- Sprint Nextel Corporation
- Sun Microsystems
- Teva Neuroscience
- Textron, Inc.
- Thermo Fisher Scientific Inc.
- Thomas Publishing Company
- Toys "R" Us
- Tyco Fire & Security
- United Parcel Service
- Unilever Research USAA
- Verizon
- Visa
- Volvo Cars North America
- W.W. Grainger
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- Washington Mutual
- Welch Allyn, Inc.
- Wells Fargo & Company
- Whirlpool Corporation
- Wm. Wrigley Jr. Company
- Wyeth Pharmaceuticals
- Xerox Global Services Business

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- AFLAC
- Alcoa
- AutoTrader.com
- Avaya
- Barclays Capital
- Batesville Casket
- Battelle Memorial Institute
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- SAIC
- Sandia National Laboratories
- Siemens Building Technologies
- Tellabs
- Thomas Publishing Company
- Unilever Research
- USAA
- Verizon
- Walgreens

WHO SHOULD ATTEND:

- Vice Presidents, Directors and Managers of:
 - Competitive Intelligence
 - Market Intelligence
 - Customer Intelligence
 - Technical Intelligence
 - Business Intelligence
- Business Development Executives
- Strategy and Corporate Development
- Strategic, Business and Market Analysis
- Strategic Marketing Executives
- Marketing Research Executives
- Business Research Managers
- Special Librarians

Schedule-at-a-glance

TUESDAY, MARCH 9, 2010

7:00am - 5:00pm Conference Registration Open

Pre-Conference Workshops

Choose one of the following:

8:00am - 5:00pm

W1 - CI 101®

2:00pm - 5:00pm

W2 - Technology Mapping, Competitive Technical Intelligence and Strategic Decisions

WEDNESDAY, MARCH 10, 2010

8:00am - 5:00pm Conference Registration Open

8:30am - 11:30am Pre-Conference Workshops

Choose one of the following:

W3 - How to Set-Up a World Class CI Function

W4 - Adopting a Scenario Mindset to Thrive in the Economic Recovery

W5 - The Holy Grail: A True Framework for Measures of Effectiveness (MOE) and ROI

GENERAL SESSION

12:45pm - 1:00pm Welcome & Opening Remarks

1:00pm - 1:30pm EXECUTIVE ADDRESS -

Creative Destruction: The Prospects for Strong and Sustained U.S. Economic Growth

1:30pm - 2:00pm KEYNOTE - Investing in Intelligence Technology

Track 1 CI Professional Growth

Track 2 CI Tools and Techniques

Track 3 Competitive Strategy to Drive Growth: C- Suite CI

Track 4 Strategic Marketing Research and Intelligence

Track 5 Globalization of CI

2:00pm - 3:30pm Concurrent Tracks - Interactive Breakout Sessions: Create, Communicate & Connect

Participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following:

T1 - 1 The Death of the CI Professional: The Changing Paradigm for Competitive Intelligence Functions and Practitioners

T2 - 1 CI Confidential: The Tension Between Distributing Intelligence & Guarding It

T3 - 1 How to Secure CEO Buy-In to Your CI Program - Case Study & Global Best Practices

T4 - 1 CI for MR Professionals: Getting Comfortable with Uncertainty

T5 - 1 Using CI to Enter Foreign Markets

EXHIBITION HALL OPENS

3:30pm - 4:15pm Networking, Refreshment, and Exhibition

4:15pm - 5:00pm Concurrent Tracks - EXECUTIVE INSIGHTS

Choose one of the following:

T1 - 2 Polishing a Diamond: Making Good CI Products Great!

T2 - 2 Black Hats and War Gaming Best Practices

T3 - 2 Using Competitive Insights to Help Develop and Implement Corporate Strategy

T4 - 2 Integrating CI and MR

5:00pm - 5:45pm Concurrent Tracks - EXECUTIVE BULLETINS

Choose one of the following:

T1/T2 - 3 Say It and Sit Down: The 20/20 Communication Technique

T3 - 3 From Product to Service: Analyzing a New Business Model

T4 - 3 Perception Mapping and Contradiction Resolution of Voice of the Customer

T5 - 3 The What? Who? and How of Localized Competitive Toolsets

5:45pm - 6:45pm Networking Reception

7:00pm Meet in Lobby for Wine and Dine Departure

THURSDAY, MARCH 11, 2010

7:00am - 7:45am Continental Breakfast and Exhibition

7:45am - 8:00am Opening Remarks

8:00am - 8:30am KEYNOTE- Business Models are Changing.....and So Must CI

8:30am - 9:00am FIRESIDE CHAT - Insights from the C-Suite – A Frank Discussion

9:00am - 9:30am ASK THE EXPERTS! Panel Discussion - Competitive Strategy in the New Economy

9:30am - 10:15am Networking, Refreshment, and Exhibition

10:15am - 11:45am Concurrent Tracks - Interactive Breakout Sessions: Create, Communicate & Connect

Schedule-at-a-glance

Participant -driven discussions focusing on your key challenges and concerns.

Choose one of the following:

- T1 - 4A** Managing Asia-Pacific CI Engagements
- T1 - 4B** What Went Wrong?
Lessons Learned from the Demise of CI Programs
- T2 - 4** Scenario Based Planning & War Game Strategy
- T3 - 4** Blue Ocean Intelligence
- T4 - 4** The Impact of Real Time News on the CI and MI Functions
- T5 - 4** Global Counterfeit Issues and CI Strategies

11:45am - 1:00pm Solutions Wheel

Play the “wheel” and join a series of rapid-fire, one-on-one meetings with leading solution providers.

Running concurrently with . . .

Town Hall #1 - CI Transitions: Public, Private, Consulting
and

Town Hall #2 - The Global Economy and the New Consumer

1:00pm - 2:00pm The Power Lunch: Networking Roundtables Hosted by Industry Leaders

Practitioners and solution providers host a menu of luncheon roundtable discussions on pertinent industry issues. Dine and dish with industry experts. The list of roundtable discussion topics will be available on-site.

2:00pm - 3:15pm Concurrent Tracks - Interactive Breakout Sessions: Create, Communicate & Connect

Participant -driven discussions focusing on your key challenges and concerns.

Choose one of the following:

- T1 - 5** Numbers Gone Wild: Or, Precision In, Garbage Out
- T2 - 5A** Creating and Using Dynamic Topic Maps to Visualize Your Business Environment
- T2 - 5B** Using Patent Intelligence to Benchmark Against Competitors
- T3 - 5** Right Brain Intelligence for a Left Brain World:
New Approaches for Competitive Analysis
- T4 - 5** Competitive Assessment in the Defense Industry—
Lessons from the Trenches
- T5 - 5** CI Crash Investigation: Offshore Disaster

3:15pm - 4:00pm Networking, Refreshment, and Exhibition

4:00pm - 4:45pm Concurrent Tracks - CASE HISTORIES

Choose one of the following:

- T1 - 6** Show Me the Money! Rising to the Omnipotent
Challenge of Constrained Resources by Focusing on Value

T2 - 6 Integrating Web 2.0 Tools in Your Intelligence Process

T3 - 6 Market Intelligence Case History: New Competitor Sets,
New Market Entrants

T4 - 6 Bridging the Gap Between CI and MR

4:45pm - 5:30pm ASK THE EXPERTS! Panel Discussion -
The Savvy Stakeholder: CI-Driven Decision-Making

5:30pm - 6:30pm Networking Reception

6:45pm Meet in Lobby for Wine and Dine Departure

FRIDAY, MARCH 12, 2010

8:00am - 9:30am SCIP 2010: Breakfast Banquet
& Annual Awards

9:30am - 10:00am EXECUTIVE INSIGHTS - Survey Insights
into CEO and CI Interaction

10:00am-10:30am Networking Break

10:30am -11:30am Concurrent Tracks - Interactive Breakout
Sessions: Create, Communicate & Connect
Participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following:

- T1 - 7** CI Ethics/ Keeping on the Right Side of the Line:
Best Practices for Acquiring Competitive Intelligence
from a Legal Perspective
- T2 - 7** Innovative Intelligence Systems: Building a New Discipline
- T3 - 7** Mapping Out Competitor Value Propositions
- T4 - 7** State of the No Fly Zone 2010:
Virtual “Venues” for Conducting Qualitative Research

11:30am - 12:00pm EXECUTIVE CONVERSATION -
Interview with an In-House Corporate Strategist

12:00pm - 1:00pm CLOSING REMARKS - Top Take-Aways Panel

1:00pm SCIP 2010 General Session and Exhibition Concludes

Post-Conference Workshops
2:00pm - 5:00pm

Choose one of the following:

- W6 - Program Management as a CI Core Competency
- W7 - Primary Intelligence

AGENDA

Track 1	CI Professional Growth
Track 2	CI Tools and Techniques
Track 3	Competitive Strategy to Drive Growth: C- Suite CI
Track 4	Strategic Marketing Research and Intelligence
Track 5	Globalization of CI

Levels of CI Expertise Key:

Beginner: Relatively new to CI, or new to this aspect of CI

Intermediate: More than one year of CI experience; familiar with the basic activities and techniques of CI

Advanced: 5+ years of experience in CI; or in a related field

TUESDAY, MARCH 9, 2010

7:00am - 5:00pm

Conference Registration Open

Pre-Conference Workshops

Choose one of the following:

8:00am - 5:00pm

W1 - CI 101®

Workshop Leaders:

Michael Sandman

Vice President

Fuld & Company

Melanie Wing

Director, Environmental and Competitive Intelligence

Whirlpool

Back by popular demand!

CI 101® is designed for those who are relatively new to the field of CI. Participants often include seasoned executives in other corporate functions who have, or will assume, responsibility for CI initiatives and activities.

CI 101® delivers the foundation for success. It is a step by step guide to gathering and analyzing intelligence, and effectively managing the process. Participants will tour sources of secondary intelligence, and then take a deeper dive by examining techniques for conducting primary research ("human intelligence") – the heart of good intelligence gathering. Finally, interactive roundtable discussions and group exercises are focused on intelligence analysis, the key to delivering good intelligence. The power of the workshop is drawn from the combined consultant and practitioner perspectives of its leaders, and the insight and experiences of all participants.

Key Take-Aways:

- Defining "Intelligence"
- Illustrations of how to create intelligence from the bits and pieces of raw data
- Effective technique for talking to people to obtain human intelligence
- Template to organize the collection effort – within legal and ethical boundaries – so that you have the time to add value through analysis
- Proven best practices for building and managing the intelligence function

CI 101® is a registered trademark of Fuld & Company.

Beginner

2:00pm - 5:00pm

W2 - Technology Mapping, Competitive Technical Intelligence and Strategic Decisions

Workshop Leader:

Dr. Gary Oosta

President

Patent Insights

Competitive technical intelligence and technology mapping are powerful 21st century tools that provide a unique picture of competitors and the competitive landscape, and form a common framework for discussion among stakeholders. This interactive workshop will examine how technology mapping fits into the organization and into the flow of traditional competitive intelligence. Participants will explore the various types of technology maps including social networks to visualize relationships; temporal maps of patents or science to depict the flow of ideas in a technology area, reveal trends and convey company and competitor activity; and strategic situation maps to convey a complex challenge to management, display the playing field and the competition.

Key Take-Aways:

- Factors to determine how and when to use different types of technology maps
- Models for deploying CTI and technology mapping in your organization
- Key internal customers of technology mapping
- Examples of successful technology mapping and CTI projects

Beginner

AGENDA

WEDNESDAY, MARCH 10, 2010

8:00am - 5:00pm

Conference Registration Open

Pre-Conference Workshops

Choose one of the following:

8:30am - 11:30am

W3 - How to Set-Up a World Class CI Function

Workshop Leaders:

John Prescott

*Thomas O'Brien Chair of Strategy
University of Pittsburgh*

Alessandro Comai

*Ph.D. Student, ESADE Business School
ESADE Business IDEC-UPF*

This interactive workshop is designed for CI managers and directors seeking direction in how to plan develop and achieve a world class CI function in their organization. The workshop presents a research-generated model of World-Class Competitive Intelligence incorporating a project management approach to the enhancement of competitive intelligence. Participants will use the model to benchmark their current positions, to identify the phases of development their companies have gone through and to prepare action plans for further development.

Key Take-Aways:

- Steps to benchmark your CI programs relative to norms
- Process to identify gaps in your efforts
- Methodology for improving your CI function based on CI best evidence
- Development of a CI action plan to close the gaps identified in the 1st learning objective

Intermediate, Advanced

W4 - Adopting a Scenario Mindset to Thrive in the Economic Recovery

Workshop Leaders:

Ken Sawka

*Managing Partner
Outward Insights*

William Dragon

*Senior Consultant
Outward Insights*

As the US economy strengthens, fundamental questions surround the nature of the economic recovery. There are no clear cut and definitive answers, underscoring the need for organizations to prepare for strategic resiliency and flexibility. The workshop will teach the fundamental premises of scenario planning and scenario-based early warning, and apply the technique to the development of post-recession growth strategies. Participants will engage in a process to ensure their organizations are developing a blend of core strategies to commit to, and contingent strategies based on actual market, industry, and competitive developments that that can be deployed when necessary.

Key Take-Aways:

- A framework and methodology for scenario-based strategic planning that helps companies embrace uncertainty by planning for multiple plausible futures
- Instructions on using scenario-based strategic planning to manage the uncertainty inherent in future economic and business conditions
- Best practices for developing and implementing a strategic early warning framework that ties specific indicators and signposts of future economic conditions to contingency plans pre-tested for resiliency against such conditions

Advanced

W5 - The Holy Grail: A True Framework for Measures of Effectiveness (MOE) and ROI

Workshop Leaders:

David Kalinowski

*President & Chief Operating Officer
Proactive Worldwide, Inc.*

Gary D. Maag

*Chairman & Chief Executive Officer
Proactive Worldwide, Inc.*

This workshop will answer the prevailing and undoubtedly most-asked question: "How do I demonstrate the value of our CI function?" Measuring the ROI for CI is imperative in today's hypercompetitive business environment. An ROI calculation will arm you to compare the costs of your CI activity or function with the value of its results to demonstrate that the result was worth the investment. There has been no specific, proven model or formula that has been established to determine the ROI for those practicing CI. Until now.

Key Take-Aways:

- A framework to define and understand the essence and importance of CI ROI
- Examples of specific ways to create and cultivate an internal culture for CI ROI
- Tools and action steps to develop a practical ROI transformational framework and reinforce it with human systems
- A unique high-performance planning model for building an ongoing, cohesive ROI tracking and reporting process
- Six steps to achieving acceptance from the C-Suite

Beginner, Intermediate

GENERAL SESSION

12:45pm - 1:00pm

Welcome & Opening Remarks

1:00pm - 1:30pm

EXECUTIVE ADDRESS - Creative Destruction: The Prospects for Strong and Sustained U.S. Economic Growth

Dr. Paul Thomas

*Chief Economist
Intel Corporation*

The United States bounced back from most twentieth century downturns with reinvigorated economic growth. The latest recession has lasted long enough to cause large cumulative losses in employment and asset values and to generate proposals for extensive new economic regulation. Will these events foreclose or clear the way for a decade of strong economic recovery? Could renewed personal savings, a declining dollar, and revitalized technological leadership generate another decade of impressive U.S. economic growth and profits?

1:30pm - 2:00pm

KEYNOTE - Investing in Intelligence Technology

AGENDA

2:00pm - 3:30pm

Concurrent Tracks - Interactive Breakout Sessions:
Create, Communicate & Connect

Participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following:

T1 - 1 The Death of the CI Professional: The Changing Paradigm for Competitive Intelligence Functions and Practitioners

Facilitator:

Ken Sawka

Managing Partner

Outward Insights

Until recently, the enduring model of best-in-class competitive intelligence functions were ones that reported to the company CEO or executive committee, were highly centralized, and were staffed with full-time, professionally trained intelligence practitioners. Today, amid more dynamic business models and “ecosystems,” economic turmoil, and changing corporate decision-making philosophies, the existence of the centralized, strategically positioned CI function is almost as rare as a three-dollar bill. This interactive session will explore the implications of this changing organizational paradigm, and the benefits it brings for corporations, individuals currently working in a competitive intelligence role or who aspire to do so, and for SCIP.

Key Take-Aways:

- Insight on how to adapt to a new corporate approach to CI that considers it less a profession, and more a corporate discipline
- Ideas on how to seize opportunities created by the resulting increase in the number of people inside an organization practicing competitive intelligence, including market research, product development, brand management, and others.
- Advice for CI practitioners on how this change can enhance their career progression, and tips for CI practitioners on how to self-market their skills
- Guidance for corporate managers and executives on how to best leverage the benefits of CI functions under this new emerging corporate model

Intermediate

T2 - 1 CI Confidential: The Tension between Distributing Intelligence & Guarding It

Co-Facilitators:

Neal Ochsner

President

Ochsner Consulting Group

Jim Gerretson

Chief Executive Officer

Gerretson LLC

CI is usually highly confidential, incorporating sensitive internal information about your own organization, as well as what you know about competitors. At the same time, CI often has limited use unless it is distributed to far flung users in your organization. While Information Security departments often have a major role in protecting enterprise networks, the CI department is a major producer, repository and distributor of confidential data with important responsibilities for the protection of that data.

Key Take-Aways:

- Prudent policies and education you can put into action immediately
- Supporting technology, both simple and advanced
- What can go wrong: CI horror stories, including a demonstration of how “secrets” can be highly vulnerable

Beginner, Intermediate, Advanced

T3 - 1 How to Secure CEO Buy-In to Your CI Program - Case Study & Global Best Practices

Co-Facilitators:

Victor Knip

Vice President

Global Intelligence Alliance

Michel Bernaiche

Manager of Competitive Intelligence

Dunkin' Brands Inc.

This interactive session will deliver crystallized clarity on exactly how to capture and sustain the attention and support of your CEO. Securing senior executive buy-in and support for intelligence has been the longstanding but often elusive goal of corporate market intelligence functions. Establishing a truly strategic intelligence function that supports and serves the needs of the CEO and her/his senior officers is critical to the success of both the corporation as well as the career of the CI professional. This session draws upon unique perspectives of two who have done so: The “mile deep” perspective of a veteran CI practitioner coupled with the “mile wide” approach of a seasoned CI consultant.

Key Take-Aways:

- A practical toolkit of implementable, market-proven best practices for securing the psychological buy-in, support and funding for a world-class CI program by the C-level suite.
- Anecdotal cases on getting and keeping C-Level Suite commitment to CI during times of economic growth and recession
- A robust set of global best practices for winning enthusiastic CEO support, secured from the GIA's Global Surveys of Market Intelligence and based on interviews with the top 50 companies in the 15 largest countries
- Success story of how a veteran CI professional moved his CI program from an obscure marketing support function to a direct report to the CEO

Intermediate

T4 - 1 CI for MR Professionals: Getting Comfortable with Uncertainty

Facilitator:

Rob Amann

Vice President, Strategic Analysis

ORC Guideline

CI often requires looking at the world and research in new and different ways that can be challenging for classically-trained market research professionals. In competitive intelligence research and analysis, sample sizes are typically smaller and the analytical leaps of faith involved can be larger than expected. It's unfamiliar ground: What's a market research professional to do? This interactive session uses a case study to illustrate common challenges and solutions. This is a “must-attend” for anyone who bridges both competitive intelligence and market research functions and is seeking to become a more balanced practitioner overall.

Key Take-Aways:

- A firm grasp of the meaningful differences between CI and market research
- Guide to the implications of these differences on your analysis and insights
- “Coping strategies” for managing the uncertainty and occasional “squishiness” market research professionals often perceive in competitive intelligence
- Steps to appreciate the strengths of each approach and address possible implications of the weaknesses

Beginner, Intermediate, Advanced

AGENDA

T5 - 1 Using CI to Enter Foreign Markets

Facilitator:
Raoul Farcot
Vice President
Cipher Systems

Market or Strategic Intelligence can support your organization to identify and evaluate a wide range of growth opportunities in global markets, ranging from Foreign Trade (export) opportunities to direct investment opportunities. This interactive session delivers tools and best practices to assess and validate market opportunities, identify and evaluate acquisition candidates, assess the strengths of your competitors, and/or evaluate the requirements of customers in selected market segments.

Key Take-Aways:

- New thinking on Strategic Research – beyond conventional “Competitive Intelligence”
- Analytical and research frameworks to evaluate foreign market data – including utilizing the M&A due diligence framework to help support expansion into a new market
- Case studies of companies who have successfully applied strategic research to identify strategic partners, customers and/or to enter new markets

Intermediate

EXHIBITION HALL OPENS

3:30pm - 4:15pm

Networking, Refreshment, and Exhibition

4:15pm - 5:00pm

Concurrent Tracks - EXECUTIVE INSIGHTS

Choose one of the following:

T1 - 2 Polishing a Diamond: Making Good CI Products Great!

Daniel Mulligan **Louise Killeen**
Assistant Professor *Mercyhurst College*
Mercyhurst College

A common complaint among CI professionals is that decision makers sometimes ignore results and recommendations. This is often followed by a “called on the carpet” session where the CI analyst is asked to explain why they “missed” something that is important. Ironically, in many instances, the analyst was aware of the situation and did convey the message. Unfortunately, it was misunderstood – or missed completely. This interactive session is designed to help participants recognize, evaluate, and tailor their products to alleviate these problems. Based on concepts and methodologies used by the U.S. national security intelligence agencies (and put into practice by the presenters with the government of Iraq, the U.S. Dept of Defense and corporate clients in Europe and the United States), participants will be led through an exercise to identify and improve the impact of their analytical findings.

Key Take-Aways:

- Diagnostics for why some CI products are ignored or misunderstood
- Success factors to decrease misperception and miscommunication associated with CI findings
- A methodology to tailor your organization’s CI to your decision makers and maximize effectiveness

Intermediate

T2 - 2 Black Hats and War Gaming Best Practices

Karen Duvall
Vice President, Business Intelligence
L-3 Communications

This presentation delivers a best practices review of the black hat or war gaming exercise. It will share insight into what has and has not worked, and the pre and post event activities that are required for success and ultimate value to the organization.

Key Take-Aways:

- Guide to achieve true success in black hats exercises
- Action steps to prepare for, execute and follow-up on war gaming exercises to provide real value
- Examples of methods used by companies to conduct these sessions, and the lessons learned

Advanced

T3 - 2 Using Competitive Insights to Help Develop and Implement Corporate Strategy

Dale Fehring **Melanie Wing**
Owner *Director of Category Insights*
Inkwell Productions Whirlpool

As national economies emerge from recession, many companies will examine their corporate strategies with an eye to updating or revising them. Competitive intelligence should be a natural component of this process, but it is often overlooked. This session will help you, as a CI professional, see where you can add value to the strategy planning process, and will review case studies and offer suggestions for how to ensure that CI is an integral part of the procedure.

Key Take-Aways:

- Techniques to help management implement a new or revised corporate strategy through competitive research, analysis, and insights
- Case studies where CI has obtained a “seat at the table” when senior management prepared to develop a new or revised corporate strategy
- Examples of how you can add value to the process of strategic planning, brainstorming, research, and implementation

Intermediate, Advanced

T4 - 2 Integrating CI and MR

Sharon Pearl
Vice President
JPMorgan

Drawing from her expertise and experiences at JP Morgan, Sharon Pearl will share insight into the synergies that exist between the marketing research and competitive intelligence functions. Case examples will illustrate how JPMorgan has integrated these disciplines to deliver enhanced value in strategic decision-making.

Key Take-Aways:

- Key action steps to leverage market research and CI synergy
- The dos and don’t of successful integration of the two disciplines
- Guidelines to prepare and deliver the information to answer strategic and tactical questions to help drive business growth

Beginner

AGENDA

5:00pm - 5:45pm

Concurrent Tracks - EXECUTIVE BULLETINS

Choose one of the following:

T1/T2 - 3 Say It and Sit Down: The 20/20 Communication Technique

Judith Leavitt
Market Research Manager
Rockwell Collins, Inc.

Do you need a fresh way to communicate your competitive intelligence insights to senior leaders? Try the revolutionary presentation technique, pecha kucha (pronounced "pe-chak-cha"). Described as part art form, part competitive sport, pecha kucha presentations (a Japanese term that means 'chit-chat' or 'chatter') are also described as 'flash' or 'lightning' presentations. Tell your audience what you want them to know in 6 minutes and 40 seconds – that's 20 slides at 20 seconds each – and then sit down. This lightning presentation technique forces you to keep your presentation precise and focused and avoids 'death by PowerPoint'.

Key Take-Aways:

- Guidelines for planning and preparing a pecha kucha presentation
- Experience a pecha kucha presentation on 10 global 'shifts' that can be used for scenario planning
- An initial plan to draft your own pecha kucha presentation

Beginner, Intermediate

T3 - 3 From Product to Service: Analyzing a New Business Model

Michael Sperger
Director of Market Intelligence
SAP AG

A growing number of traditional manufacturing businesses have started changing their business models. Rather than offering products for sale in the usual one-time purchase model, these companies are offering their customers annuity services. Instead of buying a jet engine, for instance, an airline would lease an engine and receive ongoing monitoring and maintenance in addition to the engine itself. There are compelling strategic and financial drivers that will lead more and more companies to make this shift. And as the change ripples across industries, the question for CI practitioners will be: What does it mean for our business? Moreover, how does the practice of CI change in the process?

Key Take-Aways:

- A checklist of the strategic, tactical, financial, and operational changes that the CI function will need to assess when competitors shift to from a product to a service model
- A new analytical framework to identify competitive risks and opportunities associated with the product/service business model transition
- Examples from several industries

Intermediate, Advanced

T4 - 3 Perception Mapping and Contradiction Resolution of Voice of the Customer

David Conley
Program Manager
Intel Corporation

Voice of the Customer (VOC) is a powerful concept but often fails to capture the interrelationship between various customer perceptions across customer profiles or conflicting desires between customer types (e.g. - customers in the market place versus customers in other organizational departments). This presentation will demonstrate the use of Perception Mapping to convert VOC into concrete strategies that can be utilized to move your organization towards optimizing value delivery to the customer.

Key Take-Aways:

- A demonstration of a Perception Mapping analysis of a real life VOC statement
- Contradiction resolution methodologies (based upon the Theory of Inventive Problem Solving (TRIZ)) demonstrated in relation to the case study
- Ways to merge seemingly unrelated perceptions, from a wide variety of stake holders, into one coherent model
- Guide to transcending contradictions to move your system, process, or product to the next level of performance

Advanced

T5 - 3 The What? Who? and How of Localized Competitive Toolsets

Ellen Julian
Director, Global Competitive Intelligence
Monster Worldwide

Effective competitive intelligence requires market-specific input which only the field can provide. Garnering this level of cooperation is difficult within headquarters, let alone in far-flung regional offices around the world. Through a combination of best-practice sharing and audience participation, this session will equip resource-constrained competitive intelligence leaders to create powerful and localized competitive toolsets by efficiently collaborating with local sales and marketing teams. What? Who? And How means detailing What kind of competitive information can have the most impact quickly, Who the local sources are that can provide it, and How the information can be efficiently collected and converted into sales tools.

Key Take-Aways:

- Templates, checklists, and schedules for competitive sales tool development
- Guide to identify local collaborators, overcome their objections, and incentivize them to contribute
- Attention-grabbing communication strategies to spotlight when new localized tools become available

Intermediate

5:45pm - 6:45pm

Networking Reception

7:00pm

Meet in Lobby for Wine and Dine Departure

The networking never ends...join your colleagues in this Dutch treat gathering to kick back, relax, and enjoy a meal with new found friends. It's another great opportunity to further business relationships.

AGENDA

THURSDAY, MARCH 11, 2010

7:00am - 7:45am

Continental Breakfast and Exhibition

7:45am - 8:00am

Opening Remarks

8:00am - 8:30am

KEYNOTE- Business Models are Changing...and so Must CI

Ravi Parmeswar
Managing Director
Citigroup

The world today is complex and operating at hyperspeed. Competitive Intelligence now has to be everyone's job, and we as a professional must adapt and evolve to excel. Ask yourself the hard question: Is your Competitive Intelligence generating meaningful information or is it an exercise in bureaucracy?

Key Take-Aways:

- Insight into why today's CI department is expected to operate more like a shared service to the enterprise
- Action steps to decentralize your Competitive Intelligence function
- Best practices for embedding a network of insights experts throughout your organization, to deliver richer insights at greater speed
- A checklist of critical skills needed to mine insights in today's dynamic marketplace
- How to stop writing reports and start providing informed, actionable insights

8:30am - 9:00am

FIRESIDE CHAT - Insights from the C-Suite – A Frank Discussion

James K. Cornell
Chief Marketing Officer
Prudential Retirement

Moderator:
Scott Leeb
Vice President, Business Intelligence
Prudential Retirement

9:00am - 9:30am

ASK THE EXPERTS! Panel Discussion - Competitive Strategy in the New Economy

Moderator:
Timothy J. Kindler
Director of Strategic Resources
Eastman Kodak Company

Panelists Include:
Dr. Daniel Pascheles
Vice President, Head Global
Competitive Intelligence
Merck & Co., Inc.

Lloyd Babbitt
Head of Competitive Intelligence
W.W. Grainger

How does a competitive intelligence function ensure relevance and deliver value in the new economy? A panel of seasoned CI executives explore the type of insight necessary to support C-Suite strategic initiatives to drive growth in today's economic conditions.

Key Take-Aways:

- Insight on how recessionary conditions drive competitive behavior, and an eye toward the future
- Best practices for driving revenue and share acquisition
- Lessons Learned: Avoiding Future Surprises

9:30am - 10:15am

Networking, Refreshment, and Exhibition

10:15am - 11:45am

Concurrent Tracks - Interactive Breakout Sessions:

Create, Communicate & Connect

Participant - driven discussions focusing on your key challenges and concerns.

Choose one of the following:

T1 - 4A Managing Asia-Pacific CI Engagements

Facilitator:
Sean Freston
Managing Director, Asia Pacific
Proactive Worldwide, Inc.

In today's evolving competitive landscape, CI groups are increasingly being tasked with obtaining competitive and market intelligence from countries within the Asia-Pacific region. It is imperative that the CI group understand the regional attributes, which not only make the Asia-Pacific an opportunity, but provide several challenges as well. This presentation will convey the importance of understanding individual country PEST trends including language/deliverable timing challenges, managing internal client expectations and identifying/working with regional external CI providers.

Key Take-Aways:

- The key factors that need to be understood in conducting multi-country CI engagements in the Asia-Pacific
- Critical items that must be shared with internal clients to manage expectations
- A foundation for engaging the appropriate external CI providers

Beginner, Intermediate

T1 - 4B What Went Wrong? Lessons Learned from the Demise of CI Programs

Co-Facilitators:
Paul Houston **Jan Herring**
President President
Rivalscape Herring & Associates LLC

There is much to be learned from failure. This interactive session engages participants in several concise, hard-hitting and fact-based scenarios, built from research and enhanced by candid, off-the-record interviews with the leaders of the CI Programs that were involved. Working through these "blind" case histories, participants will identify what the true issues were, how to recognize the danger signals, what the "hard-lessons lessons" were, and how to apply those insights back on the job. In doing so, hard questions will be asked and answered such as: How does a CI Program best integrate and collaborate with other corporate functions? What are the best ways to balance the pressing demands for a CI Program to deliver immediate impact with the imperative to support long-term strategy? How do I implement a CI Program that is "built to last" and can weather corporate storms? What are the best ways to align my CI activities with corporate priorities--and do it within my resource constraints?

AGENDA

Key Take-Aways:

- Critical CI failure areas you must be aware of
- The lessons-learned from such failures and how to recognize the early warning indicators in your own corporate situation
- Ideas to apply those lessons to enhance the current effectiveness of your CI Program and prevent future failures in your organization

Intermediate

T2-4 Scenario Based Planning & War Game Strategy

Co-Facilitators:

Wayne Rosenkrans

*Vice President - Consulting/Strategy
Fuld & Company*

Michael Sandman

*Senior Vice President
Fuld & Company*

War games and scenario analysis are superb tools for getting management to make use of CI. A successful war game can result in beneficial changes in strategy with positive impact on the way intelligence is used and valued at senior levels of an organization. Often, the best way to “get it” is to “live it”. In this session, participants will shadow a public war game conducted with teams from four leading business schools (MIT, U. of Chicago, Northwestern and Columbia). Participants will see how the game unfolded, understand its process, and observe the interplay of competitive and co-opetition issues and the potential level of sophistication that can be achieved in a properly structured strategy game. Participants will also be introduced to alternative futuring as a tool for “future proofing” strategy and participate in an exercise to demonstrate the techniques. Lastly, the associated tool of strategic early warning in the context of futuring will be discussed.

Key Take-Aways:

- An opportunity to debate the predictions that emerged from the four teams of MBA candidates
- Insight into how strategy games can benefit your company
- Guide to using strategy games in your own organizations
- Ideas to improve your communications with the managers and executives who use or should use the intelligence you produce

Intermediate, Advanced

T3-4 Blue Ocean Intelligence

Co-Facilitators:

Paul Kinsinger

*Clinical Professor and Managing Consultant
Thunderbird School of Global Management*

Julia Dorfmeister

Principal Consultant

Thunderbird Learning Consulting Network

The very title of the renowned book, “Blue Ocean Strategy: How to Seek out New Markets and Make the Competition Irrelevant” couldn’t fly more in the face of competitive intelligence if it had to. After all, the focus of most CI is distinctly “Red Ocean” helping companies beat each other in the fight for known markets and customers. Blue Ocean, however, is built around radical innovation taking place outside of your four walls and beyond your current market boundaries. You have to re-adjust your competitive lens and tweak your toolkit to turn a Red Ocean arsenal into a Blue Ocean toy box. Case studies of companies that have successfully moved into un-contested waters will illustrate how they did it and what the outcomes were.

Key Take-Aways:

- Insight on CI’s critical role in supporting companies to be “radically” innovative
- Ideas to adjust the way we look at a company’s market potential and uncover new markets and customers
- Ways to tweak common CI tools to become more effective when pursuing a Blue Ocean Strategy

Intermediate, Advanced

T4-4 The Impact of Real Time News on the CI and MI Functions

Moderator:

Mike Piispanen

*Senior Vice President, Corporate Business Intelligence
Thomson Reuters*

Panelists Include:

Jack Reerink

*Company News Editor, Reuters News
Thomson Reuters*

Michael Herley

*Partner
Kekst and Company*

How quickly you receive news and information can give you a competitive advantage. You also need it to be accurate and unbiased, so your company can make informed choices. In this session, Michael Herley, partner at Kekst & Company, and Jack Reerink, Company News Editor at Reuters News, who will offer insight into how real-time news drives strategy and impacts decision-making.

Key Take-Aways:

- Gain insight into how real-time news drives strategy and impacts decision-making
- Learn how technology has enabled CI to obtain international, national and regional news in real-time
- Learn how real-time news enables companies to take advantage of opportunities in the emerging/developing markets

Beginner, Intermediate, Advanced

T5-4 Global Counterfeit Issues and CI Strategies

Co-Facilitators:

Murali Parthasarathy

*Chief Executive Officer
Learning-Organized LLC*

Branimir Brankov, M.D., M.B.A.

*Senior Director,
Strategic Business Intelligence
Merck & Co., Inc.*

The pharmaceutical industry is a leader in the movement towards a blended world of internal and external resources to deliver their R&D, manufacturing and marketing services. Finding credible and reliable partners is the make or break success factor. This interactive session will help participants to identify their issues, challenges, and the potential areas where they need to be better informed.

Key Take-Aways:

- New CI capabilities
- New approaches to use them
- Why this matters so much to your CEO

Intermediate

AGENDA

11:45am - 1:00pm

Solutions Wheel

Play the “wheel” and join a series of rapid-fire, one-on-one meetings with leading solution providers.

Running concurrently with . . .

Town Hall #1 - CI Transitions: Public, Private, Consulting

Moderator:

Joe Goldberg

Director, Global Affairs

AKPD Message and Media

Don't miss the opportunity to join your peers for an open mic forum to discuss the challenges, opportunities, and experiences in transitioning in and between the public, private, and consulting CI sectors.

and

Town Hall #2 - The Global Economy and the New Consumer

Moderator:

Sarah Boumphrey

Global Countries and Consumers Research Manager

Euromonitor International

Don't miss the opportunity to join your peers for an open mic forum to discuss the biggest challenges facing you every day. This Town Hall will focus on how consumers have evolved during the economic crisis, their response to adverse conditions, regional differences in behavior, how quickly trends are changing and where these changes may head over the next five years.

1:00pm - 2:00pm

The Power Lunch: Networking Roundtables Hosted by Industry Leaders

Practitioners and solution providers host a menu of luncheon roundtable discussions on pertinent industry issues. Dine and dish with industry experts. The list of roundtable discussion topics will be available on-site.

2:00pm - 3:15pm

Concurrent Tracks - Interactive Breakout Sessions:

Create, Communicate & Connect

Participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following:

T1 - 5 Numbers Gone Wild: Or, Precision In, Garbage Out

Facilitator:

Mark Chussil

Founder and Chief Executive Officer

Advanced Competitive Strategies, Inc.

This is an interactive session about strategic thinking, and getting a fresh view on common challenges. No statistical expertise is required, because we are not talking about calculating, decimal points, or the difference between correlation and causation (whew?!). Through a series of exercises and games demonstrating how misuse of numbers leads to strategy mistakes, this session will challenge you to re-think numbers and the numbers you choose to think about. Quants and quans will be equally comfortable and entertained. We'll talk about strategy mistakes in the context of mental models, precision, spreadsheets, gap analysis, trend lines, paper-folding, groupthink, survivor bias, analyzing novel situations, and the Strategist's Dilemma.

We'll talk about the mistakes incumbents make that let upstarts win. And no, the mistakes we'll talk about are probably not those you're expecting. For example, although garbage in, garbage out is a problem for spreadsheets, it's almost trivial as these problems go.

Key Take-Aways:

- How to prevent common analytic techniques containing hidden assumptions from unintentionally distorting your decision-making
- Ideas to combine the best of qual and quant thinking to make better strategy decisions
- Ways to better predict (and surprise) competitors

Beginner, Intermediate

T2 - 5A Creating and Using Dynamic Topic Maps to Visualize Your Business Environment

Co-Facilitators:

Jesper Martell

Chief Executive Officer

Comintelli

Daniel Thomasson

Project Manager, Mapping

Comintelli

A structured approach to intelligence information makes CI faster and more efficient. This interactive session demonstrates such an approach, using Topic Maps to visualize and organize a dynamic business environment. Everyone monitors their business environment in one way or another, but it only becomes intelligence when it is applied and used systematically.

Key Take-Aways:

- A guide to topic maps and taxonomies
- A tool for creating a customized topic map using a defined process
- Examples of Topic Maps
- Illustration of Topic Maps in practice: From Information to Intelligence

Intermediate

T2 - 5B Using Patent Intelligence to Benchmark Against Competitors

Facilitator:

Ric Snead

Product Specialist

Thomson Reuters

This session provides best practice tools and techniques to successfully use patent intelligence to benchmark your organization against the competition in business critical areas. Participants will gain new capabilities to improve strategic decision making in R&D planning, product development risk assessment, identifying potential partners, identifying buyers or cross-licensing opportunities. . . .and more.

Key Take-Aways:

- Techniques for IP ownership assessment: Establishing ownership of IP is challenging because of M&A/spin-off activity and technology rights licensing and sale
- Guide to activity measurement: Using representative documents from a patent family for analysis
- Techniques for a robust comparative analysis of competitive technology trends and competing portfolios
- Competitive merger impact assessment: techniques to assess potential synergies and risks posed by the merger of competing organizations

Intermediate

AGENDA

T3 - 5 Right Brain Intelligence for a Left Brain World: New Approaches for Competitive Analysis

Facilitator:

Fred Wergeles

Principal

Fred Wergeles and Associates LLC

By some estimates, there are over 200 distinct methodologies and tools that can be used by intelligence analysts as they try to better understand today's complex business issues and forecast potential future developments. Rather than approach an intelligence problem only as a methodical, step-by-step process, what may be needed in an increasingly complex world is to understand the relationships between various interconnected issues.

Key Take-Aways:

- New thinking, above and beyond conventional wisdom, to analytical problem
- Less structured and more creative methods to use alongside proven techniques to gain a deeper perspective of business intelligence problems
- New analytical tools to identify non-obvious relationships between people and organizations, and to see the "bigger picture"

Advanced

T4 - 5 Competitive Assessment in the Defense Industry—Lessons from the Trenches

Facilitator:

Bob Nugent

Vice President, Advisory Services

AMI International

The demand for competitive assessment in the defense sector is substantial and growing. It is critical for CI professionals active in the market to understand its unique aspects, including revenue models, products, customers, and CI consumer audiences. This interactive session provides insight into how the defense industry uses competitive assessment, and shares "war stories" to highlight some "do's and don'ts" and "lessons learned" in delivering CI to best meet the needs of the industry. Focus is primarily on US companies but examples of foreign companies using CI to penetrate or expand market share in the U.S. market will be provided.

Key Take-Aways:

- A framework of sector-specific factors shape CI requirements, research and collection approaches, and deliverables
- Lessons learned...and applied. An activity to evaluate a series of alternative approaches and recommended solutions to several concrete CI challenges
- Best CI practices drawn from other industries that can be applied to meet defense sector requirements

Beginner

T5 - 5 CI Crash Investigation: Offshore Disaster

Co-Facilitators:

Iris Marie Mission-Lorenzo

Research Director

Global Business Research Support

Kent Potter

Managing Director

Bennion Group

Most CI practitioners have handled various global projects using offshored teams with results varying across the success-disaster spectrum. CI teams without borders across time zones add a new dimension to the challenges in conducting an investigation. This interactive session will take the participants through a challenging global case study that will require everyone to interact and actively employ their knowledge and skills in

collection, analysis, project management, and presentation; with a cross-cultural audience of CI practitioners.

Key Take-Aways:

- Best practices in dealing with offshored projects
- Tools and techniques that can help alleviate dangers and prevent failure of projects
- Insight into strengthening partnerships between principal and outsourcers
- Common points of failure in conducting offshored projects

Intermediate

3:15pm - 4:00pm

Networking, Refreshment, and Exhibition

4:00pm - 4:45pm

Concurrent Tracks - CASE HISTORIES

Choose one of the following:

T1 - 6 Show Me the Money! Rising to the Omnipotent Challenge of Constrained Resources by Focusing on Value

Peter Shaw

Senior Vice President & Chief Financial Officer

Midwest Employers Casualty Company

Jody Holtzman

Senior Vice President,

Research and Strategic Analysis

AARP

Jim Mathews

Director, Competitive Intelligence

& Price-to-Win

TASC Incorporated

This presentation will share insight into demonstrating considerable return on investment in CI that keep the cost cutters focused elsewhere. Organizations continue to struggle for limited financial resources in these tough economic times. CI functions, like all service functions, are constantly forced to prove their value to their organization in order to secure funding, and these days the microscope is larger. To be successful in winning this battle we need to be our own worst critics. How are we generating value? How often are we called by management for answers or assistance? How often do our findings result in actions by management or business units? If we answer these questions honestly then we will know our value proposition to management and know if we should be concerned for our resource allocation!

Key Take-Aways:

- Key tasks that need to be accomplished to escape the endless "funding justification" exercises
- Success factors in establishing CI as a priority in the minds of management and cultivating an effective CI mentor on the leadership team
- New thinking around focusing on the value-added services of CI and letting go of standard routines

Intermediate

T2 - 6 Integrating Web 2.0 Tools in Your Intelligence Process

Phil Britton

Market Intelligence Lead

Best Buy Company

As CI increasingly becomes a corporate discipline practiced by functions throughout the organization, what you need to know likely already exists in your company. By keying in to the "wisdom of the masses", you can get better insights without needing to increase your budget. There are many new tools available to CI practitioners that can increase your leverage across your organization.

AGENDA

Key Take-Aways:

- Insights on leveraging the collective knowledge already in your company
- Guide to free or web-based tools which fit in your budget
- A menu of reasons to compel people to contribute to CI, and lessons learned in doing so

Beginner, Intermediate

T3 - 6 Market Intelligence Case History: New Competitor Sets, New Market Entrants

Susan Lang
*Senior Vice President
& Chief Supply Chain Officer*
Express Scripts

Tom Luft
*Vice President,
Provider Strategy & Contracting*
Express Scripts

Introduced by:
Mario Theriault
Chief Executive Officer
Shift Central

Industries are in transition, looking for new and innovative ways to become more efficient, launch new technologies, leverage new opportunities for growth, etc. Healthcare is a prime example of an industry confronting these challenges head on. Many companies are facing an industry in uncertainty, with prospect of major change and upheaval. These companies must be poised for major growth and transformation, and to do so will be reliant on the kind of marketing intelligence that can drive strategy.

Key Take-Aways:

- Case history of how one company leveraged market intelligence and strategic planning to drive growth
- Specific details of its use to forecast, brief board membership, spot acquisition opportunities, track competitor activity and to develop overall sound market approaches
- Real world outcomes and lessons learned

Intermediate, Advanced

T4 - 6 Bridging the Gap Between CI and MR

Anca Costea
CI/MI Analyst, Healthcare
Covidien

Nanette Bulger
Senior Sector Director, MarketIntelligence
Philips Healthcare

Marketing Research and Competitive Intelligence often go hand in hand when it comes to supporting confident decision-making in determining market opportunity, market penetration strategy and market development metrics. Although similar in nature, the two disciplines require different expertise and skills sets and many times companies fail to acknowledge the need of specialized training and development for dedicated MR/CI personnel. Participants will engage in a case study examining the potential for synergies between CI & MR, and the differences in skill sets and capabilities required.

Key Take-Aways:

- Identify opportunities to leverage Market Research (data collection and analysis techniques and processes) to predict competitor moves
- Action steps to build the necessary skills to perform both MR and CI and take advantage of their common focus
- Recommendations for building a stronger MR/CI symbiotic relationship by gaining management support for the necessary investments

Beginner, Intermediate, Advanced

4:45pm - 5:30pm

ASK THE EXPERTS! Panel Discussion - The Savvy Stakeholder: CI-Driven Decision-Making

Moderator:

Scott Leeb
Vice President, Business Intelligence
Prudential Retirement

Panelists Include:

Patrick Sweeney, PE
*Vice President of
Business Development*
Pepco Energy Services

Samuel Arbel
*Vice President Business Development,
Defense Programs*
IAI North America

D. Craig McHenry

Senior Director Competitor Insights
Pfizer Nutrition

The business environment of 2010 is one in which competing priorities vie for scarce resources. It is more important than ever that the CI professional collaborate effectively with his/her internal stakeholders to focus on creating intelligence that drives decision making and helps grow the organization. Seasoned CI professionals join stakeholders from functional areas like marketing, strategic planning, etc. in a candid discussion of best practices for using CI to create strategic, competitive advantage.

Key Take-Aways:

- Insight on understanding executive priorities
- Best practices for developing actionable intelligence
- Powerful ways stakeholders can apply intelligence to their business challenges
- Success factors in increasing CI's visibility within the organization

5:30pm - 6:30pm

Networking Reception

6:45pm

Meet in Lobby for Wine and Dine Departure

The networking never ends...join your colleagues in this Dutch treat gathering to kick back, relax, and enjoy a meal with new found friends. It's another great opportunity to further business relationships.

AGENDA

FRIDAY, MARCH 12, 2010

8:00am - 9:30am

SCIP 2010: Breakfast Banquet & Annual Awards

SCIP Program Committee

9:30am - 10:00am

EXECUTIVE INSIGHTS - Survey Insights into CEO and CI Interaction

David Frigstad
Chairman
Frost & Sullivan

This presentation shares insights into competitive intelligence and competitive strategy, gleaned from a global survey of over 1,000 CEOs.

Key Take-Aways:

- New thinking above and beyond the conventional wisdom
- Ideas for what you can do with the information to elevate your role in championing growth and delivering true value to your CEO
- Calls to action

10:00am - 10:30am

Networking Break

10:30am - 11:30am

Concurrent Tracks - Interactive Breakout Sessions:

Create, Communicate & Connect

Participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following:

T1 - 7 CI Ethics/ Keeping on the Right Side of the Line:
Best Practices for Acquiring Competitive Intelligence
from a Legal Perspective

Co-Facilitators:

Robert Milligan
Partner
Seyfarth Shaw LLP

Michael Wexler
Attorney
Seyfarth Shaw LLP

More than ever, CI professionals need to be mindful that only intelligence that is gathered lawfully benefits their company in the long run. There may be a temptation to push the envelope or take unnecessary risks to distinguish oneself or one's company in these economic times. However, recent cases involving the theft of trade secrets or privacy violations serve as a stark reminder that CI professionals should do it right or not do it at all. CI professionals must vigilantly play both offense and defense in order to gather useful information in an ethical manner while simultaneously protecting their own companies from disclosing sensitive information.

Key Take-Aways:

- A guide of general legal principles involved in gathering CI
- Latest developments in privacy and trade secret/unfair competition law as it relates to CI
- Best practices for gathering CI to avoid legal liability and adding value for your company/client

Beginner

T2 - 7 Innovative Intelligence Systems: Building a New Discipline

Co-Facilitators:

Tanguy Cariou
Senior Analyst
Interligare

Esther Quintero
Head, Research
Interligare

The discipline of Intelligence is undergoing significant transformation; all efforts are geared toward systematizing intelligence production methods. This interactive discussion explores a scientific, evidence-driven intelligence model of universal application, and the socio-technical system and analysis tools that support this novel approach.

Key Take-Aways:

- Insight on the new needs created by the intelligence paradigm and how a structured approach can deliver evidence-based strategic information
- Implementation guide covering every element, i.e. staff training and organization, analysis techniques and performance, taking advantage of IT as an underlying tool helping to efficiently operate the whole system
- Specific case studies, outcomes, and lessons learned in corporate, government, social and academic practices

Beginner, Intermediate, Advanced

T3 - 7 Mapping Out Competitor Value Propositions

Facilitator:

Erik Glitman
Managing Director
Fletcher/CSI, LLC

This interactive session uses real world examples of competitor bid documents collected through the freedom of information act (FOIA) process. Participants will dissect the bid documents and compare competitor submissions to the actual RFP issued by the customer. Aspects of the value proposition that will be covered include required elements, value enhancements, value detractors, and surplus value elements.

How each of the competitors performed against the value proposition elements will be used to assess which elements of the competitor value proposition most closely aligned with the customer desires. The actual winning bid will be disclosed and a comparison between the winning bid and other bids will be completed.

Key Take-Aways:

- Guide to accessing competitor bid documents through the FOIA process
- Key considerations in interpreting competitor bid documents and customer RFPs
- Illustration of alignment of competitor value proposition with the customer desires
- Key considerations in interpreting competitor bid documents and customer RFPs
- Illustration of alignment of competitor value proposition with the customer desires

Advanced

AGENDA

T4 - 7 State of the No Fly Zone 2010: Virtual “Venues” for Conducting Qualitative Research

Facilitator:

Jeffrey C. Adler, PRC

President

Centrac DC Marketing Research

Virtual “venues” for conducting qualitative research are fast becoming an accepted means of gathering data. This is largely due to an increase in comfort and familiarity on the part of both the researcher and participants with the methodology and tools (e.g. the Internet, webcams, online communities/social networking). While there will always be a place for in-person qualitative research, online technologies facilitate a variety of interaction that is not generally possible in traditional settings and lead to richer data and a more robust experience.

Key Take-Aways:

- The 5 Ws (Who, What, When, Where, Why)
- A toolkit of virtual techniques
- Diagnostics to determine which applications are candidates to benefit from online qualitative

Beginner, Intermediate, Advanced

EXHIBITION HALL CLOSES

11:30am - 12:00pm

EXECUTIVE CONVERSATION - Interview with an In-House Corporate Strategist

Nigel Brown

Vice President of Business Development and Strategy
Covance Inc.

Moderator:

Mark R. Little, Ph.D.

Vice President
Covance Inc.

12:00pm - 1:00pm

CLOSING REMARKS - Top Take-Aways Panel

1:00pm SCIP 2010 General Session and Exhibition Concludes

Post-Conference Workshops

Choose one of the following:

2:00pm - 5:00pm

W6 - Program Management as a CI Core Competency

Workshop Leader:

Michael Sperger

Director of Market Intelligence

SAP AG

Is it possible to answer a \$50K problem with a less than \$10K budget? It is a real challenge these days, as CI teams are increasingly faced with addressing a growing set of requirements in an environment of resource constraints. This workshop equips you with the fundamentals of program management, and enables you to position yourself not as a lone analyst but as a CI practice leader managing a set of organizational resources.

Key Take-Aways:

- The must have skills for program management: fundraising, vendor relations, and navigating procurement
- The essentials of internal resource management in corporate CI
- Ways to secure current-year and next-year resources you can put into action immediately
- Ideas to extend the reach and depth of your CI practice by making smart use of available resources

Beginner, Intermediate

W7 – Primary Intelligence

Workshop Leader:

Roger Phelps

President

Phelps Research Services

This workshop is designed for those new to primary intelligence collection and those who want to improve their skills. It will include modules on interview preparation, collection techniques, some advanced elicitation, and interpretation of primary intelligence to actionable results. Overall, the anatomy of a successful primary intelligence program will be outlined. Participants will be exposed to several successful primary client examples. They will also be given opportunities to hone their skills through class exercises.

Key Take-Aways:

- Learn how to successfully integrate primary intelligence into your research methodologies
- Learn basic and advanced methods of conducting executive interviews
- Learn some of the best ways of analyzing and interpreting data collected through primary intelligence

Beginner

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STRATEGIC PARTNER:



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Proactive Worldwide, Inc. specializes in customized decision support research and consulting for U.S. and multinational clients – all designed to help clients stay Out in Front® of the competition. Proactive Worldwide has been providing CI services to life sciences, financial services, technology and telecommunications, and consumer and industrial goods industries for nearly 15 years. www.proactiveworldwide.com.

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SCIP 2010 Registration

How to Register

Complete the form below and return it to SCIP via **fax** to: +1.703.739.2524, or

Mail to:
 SCIP Registration
 1700 Diagonal Rd., Suite 600
 Alexandria, VA 22314, USA

Select Your Registration Category:

Full Registration	Regular Rate	Onsite Rate
SCIP Members	<input type="checkbox"/> \$1500	<input type="checkbox"/> \$1700
New Members* (Includes Join Fee)	<input type="checkbox"/> \$1745	<input type="checkbox"/> \$1945
Non-Members	<input type="checkbox"/> \$1,800	<input type="checkbox"/> \$2,000
Academic/Student/ Government**	<input type="checkbox"/> \$1,345	<input type="checkbox"/> \$1,445
Group Member Rate†	<input type="checkbox"/> \$1,250	<input type="checkbox"/> \$1,450
Spouse Networking Pass	<input type="checkbox"/> \$550	<input type="checkbox"/> \$600

Daily Registration		
SCIP Members	<input type="checkbox"/> \$1,100	<input type="checkbox"/> \$1,200
New Members* (Includes Join Fee)	<input type="checkbox"/> \$1,345	<input type="checkbox"/> \$1,545
Non-Members	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,600
Academic/Student/ Government**	<input type="checkbox"/> \$725	<input type="checkbox"/> \$975

** contact SCIP for eligibility requirement † per person, groups of five or more

Workshops

Full Day Workshop

	Member	Non-member
TUESDAY, MARCH 9, 2010		
W1 - CI 101®	<input type="checkbox"/> \$955	<input type="checkbox"/> \$1230

Half Day Workshop

	Member	Non-member
TUESDAY, MARCH 9, 2010		
W2 - Technology Mapping, Competitive Technical Intelligence and Strategic Decisions	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868

WEDNESDAY, MARCH 10, 2010		
W3 - How to Set-Up a World Class CI Function	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868

W4 - Adopting a Scenario Mindset to Thrive in the Economic Recovery	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868
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W5 - The Holy Grail: A True Framework for Measures of Effectiveness (MOE) and ROI	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868
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	Member	Non-member
FRIDAY, MARCH 12, 2010		
W6 - Program Management as a CI Core Competency	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868
W7 - Primary Intelligence	<input type="checkbox"/> \$588	<input type="checkbox"/> \$868

Conference Registration

First Name	Last Name
Title	
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Method of Payment

Enclosed is a **check** in the amount of:

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For payment by wire transfer, please contact SCIP Member Services at memberservices@scip.org or +1.703.739.0696. All prices are in U.S. dollars.

Policies

Cancellation policy and fees: Payment in full is required immediately upon registration and is non-refundable. If, for any reason, you are unable to attend the event for which you are registered, and notify SCIP in writing more than 3 weeks prior to the event start date, a one-time credit will be issued for use toward registration at any other event. The credit must be used within 90 days of the original registration date and can be applied to any event scheduled up to one calendar year from the event for which you originally registered. Credits may not be transferred more than once, and all unused credit(s) will be forfeited after 90 days. Cancellation within 21 days prior to the event will incur a one time fee of \$500. The remaining balance can be applied to any event up to one calendar year from the event for which you originally registered. Notification must be received by SCIP in writing. If you do not attend the event and fail to notify SCIP PRIOR to the event, no credit will be issued. Every effort is made to ensure that the speakers noted in this brochure are present, but changes beyond SCIPS control may occur.

Hotel accommodations

Washington Marriott Wardman Park Hotel

2660 Woodley Road, NW
 Washington, DC 20008
 Tel: 1.202.328.2000
 Fax: 1.202.234.0015

Discounted rate \$229. Cut off date February 8, 2010.

SCIP will be reserving a limited number of discounted rooms at the hotel property. Please contact the property directly for rates, availability, and to book your accommodations. Be sure to mention you will be participating in the SCIP event.