



## Case Study

**The Client:** The client is the global market leader in its major business unit. Its CI team learned that a mega-competitor from Asia was considering entering that space. The client had not faced that competitor in head-to-head market battles before, and had only a limited view of the company. The client was unfamiliar with the new senior management team that would lead the competitor's entry.

**The Issue:** The client needed to assess the competitor's capabilities and intentions. It needed a comprehensive view of the R & D pipeline, manufacturing capacity, distribution channels and marketing and sales strategies. The client needed to understand the likely moves of the competitor's key executives: not only what the competitor could do, but also what the competitor *would* do.

**The Task:** Initial assessment and planning yielded several key tasks: rapid and comprehensive research to gather all relevant intelligence available through open sources, while monitoring breaking news as the story unfolds; rapid development of sources for primary source research; deployment of a knowledgeable and skilled primary research team to target suppliers, customers, competitors, inside sources, analysts, market watchers and others; profiling of the senior management team for history, track record of successes and failures, view of the market and approaches to competition. In all, a comprehensive 360-degree portrait of the competitor and the threat was urgently needed.

**The Findings:** A comprehensive competitive assessment was developed based on analysis of intelligence gathered from the global network of sources. The assessment pinpointed competitor capabilities while the senior management team profile, including an analysis of the corporate culture, produced projective behavioral forecasting based on the most likely scenarios. Human-source counterintelligence operations disclosed the competitor's aggressive intelligence efforts supporting the market entry and specific initiatives targeting our client.

**The Outcome:** The client developed insight into the competitor's capabilities and its most likely responses to the market opportunities and challenges. It put in place an early warning system to track developments in real time. The client also implemented an ongoing security program for the protection of intellectual property. It enhanced its competitive strategy to deal with new, more serious threats. It anticipated the competitor's moves, gaining valuable lead-time. The client successfully protected its major markets and now has in place a new CI capability to deal with future threats.

**The Value Proposition:** Superior rapid-response intelligence gathering enhanced by global networks with foreign language coverage; the legacies of twelve decades of combined experience in the public and private sectors; cutting-edge analytic methodologies; business acumen and strategic insight; intense focus on pro-action and strong counter-action; consistent attentiveness to maximizing the client's own organizational effectiveness. These combined capabilities in a single resource – a seasoned team distinguished by its dedication and enthusiasm, as well as its expertise - comprise the unique value offered by Innovative Intelligence Partners (IIP). The client in this case study, recognizing both its own need and the extraordinary opportunity provided by IIP, has moved forward with a trusted consortium of CI advisors, newly confident in its ability to counter competitive threats and maximize competitive opportunities.

### **The Principals:**

**William E. DeGenaro** is president of DeGenaro & Associates and has more than 30 years of international experience in strategic planning, intelligence and business management. DeGenaro served as managing director of the Future's Group, an international consulting firm in strategic planning and business intelligence. Additionally his experience includes serving as director of Strategic Countermeasures Planning, Office of the Secretary of Defense for Counterintelligence and Security. DeGenaro was also director of business research and analysis for the 3M Company.

**Jan P. Herring** is president of Herring & Associates LLC, a management consultancy, which assists intelligence professionals set up and manage their own Business Intelligence programs as well as improve their existing intelligence processes. Jan's professional experience includes developing and managing Motorola's highly acclaimed intelligence program, co-founding the Academy of Competitive Intelligence, and in his earlier career, setting up the U.S. Government's first business intelligence program. Upon leaving the government, where Mr. Herring had served as a professional intelligence officer at the CIA, he was awarded the Agency's highest honor, the Medal of Distinction.

**Marta S. Weber, PhD** is a psychologist who has applied thirty years of clinical and forensic expertise to the intelligence domain. She pioneered in the development of remote personality profiling and behavioral forecasting and is an internationally recognized leader in this highly specialized field. She has profiled scores of business and political leaders. Dr. Weber heads Applied Behavioral Sciences, LLC, and leads major profiling research projects for Fortune 100 companies and federal US Government agencies, as well as international leaders in the legal and financial fields.

**Anne Herron, Allis Information Management** is a professional business research firm consisting of a dedicated staff of 30 researchers, analysts and an IT support team. For 27 years we have been committed to providing cutting-edge customized intelligence to support strategic planning initiatives. AIM is distinguished by our customer service, versatile solutions and customized deliverables.