2018 COMPETITIVE INTELLIGENCE INTENSIVE SUMMIT

SEPTEMBER 19-20, 2018
CHICAGO, IL

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am:
Collaborative Analytics and Insights to Unite Strategy & Innovation

Applying market segmentation and intelligence to innovate, grow and gain a competitive advantage

- Enhancing your product roadmap with an intelligence roadmap for a clearer picture of market forces and to better identify growth areas
- Multi-stage closed loop management system for strategy execution
- Better understand customer and user demand and signals to identify disruptive innovation opportunities

9:30am 15 Minute Networking and Refreshment Break

9:45am (choose from 2 sessions)
Leveraging the Single Person CI Unit

Establishing the CI presence and facing the challenges as a solo CI practitioner

- Laying the groundwork for success
- Developing a roadmap and winning buy-in
- Collaboration and inter-department partnering
- Things you can do to virtually scale
- Explore the indicators and next steps for when your CI function is ready to expand

9:45am (choose from 2 sessions)
Product Prioritization, Alignment and Decision Making

How to identify the most valuable ideas using a smart selection process

- Exploring common approaches and misconceptions in strategic planning and decision making
- Aligning opportunities, goals, strategies and measures
- Product prioritization strategy and techniques
- The art of creating alignment

10:45am 15 Minute Networking and Refreshment Break

11:00am
Executing Product Market Strategy

The continuous journey of utilizing competitive practices to influence product strategy

- Success factors to build a proven model that communicates real business value by leveraging your existing CI efforts
- Proven techniques to apply competitive feature tracking, from the high-tech software industry, to your own business situation
- Critical factors to influence your organization's key decision makers by providing competitive product guidance and strategy

12:00pm Lunch

1:00pm (choose from 2 sessions)
Digital Marketing Toolsets

Take competitive intelligence to the next level

Understanding and learning how to react to the competitive landscape can mean life or death for your company. Truly grasping your competitors means immersing yourself into their worlds. Comprehending their languages and being aware of their cultures. Delving into their DNA.

Harness traditional and hidden digital toolsets and the data they provide to help you create a holistic picture of your competitive ecosystem. Dig deep and find out what is really taking place behind the public screen of your rivals' online presence.

This session will introduce you to tools you didn't know existed. You will learn to use these secret avenues as well as conventional approaches to uncover your competitors strategies.

1:00pm (choose from 2 sessions)
Predictive Product Modeling Techniques

Taking data analysis to the next level through predictive planning

- Capitalizing on predictive analytics to improve product launch, growth and full lifecycle planning
- Apply simple modeling and forecasting techniques to spot opportunities and inefficiencies in product planning
- Forecast product growth and using scenario planning to plan for external market variables

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 2 sessions)
Win/Loss Workshop

A methodology to drive continuous competitive improvement

Win/Loss customer interviewing is original research to uncover the reasons prospects chose to purchase your products and services and why they purchase a competitor's solutions. This interactive session will cover a methodology to discover actionable information from interviewing prospects or customers and will include breakout sessions covering questionnaire creation, interpretation of results, prioritization of action, and creating concrete recommendations for change. This workshop will give you the knowledge and tools to create a customer focused Win/Loss interviewing process and how to use those results to increase your company's win rate in competitive contests. The presenter will share lessons learned working with dozens of companies.

2:15pm (choose from 2 sessions)
New Product Development Methods and Essential Intelligence Tools Workshop

Exploring multiple methods and tools to support NPD, insights and innovation needs of your organization among the others that you should know to support the ongoing intelligence needs of your analysts and decision needs of your executives.

- Develop an understanding of the need to support analysis activities occurring throughout the organization
- Gain basic exposure to the top 12 essential analytical techniques, competitor profiling featuring the four corners, driving forces analysis, industry analysis featuring the nine forces, PLC, scenario analysis, and STEEP
- New Market or Segment Entry with Existing Products and Services
- Pre-launch innovation and creative market testing insights
- Communicating value, managing process change and transitions from standard business and product development models

3:15pm 15 Minute Networking and Refreshment Break

3:30pm (choose from 2 sessions)
Win/Loss Workshop (Continued)

A methodology to drive continuous competitive improvement

Win/Loss customer interviewing is original research to uncover the reasons prospects chose to purchase your products and services and why they purchase a competitor's solutions. This interactive session will cover a methodology to discover actionable information from interviewing prospects or customers and will include breakout sessions covering questionnaire creation, interpretation of results, prioritization of action, and creating concrete recommendations for change. This workshop will give you the knowledge and tools to create a customer focused Win/Loss interviewing

process and how to use those results to increase your company's win rate in competitive contests. The presenter will share lessons learned working with dozens of companies.

3:30pm (choose from 2 sessions)
New Product Development Methods and Essential Intelligence Tools Workshop (Continued)

Exploring multiple methods and tools to support NPD, insights and innovation needs of your organization among the others that you should know to support the ongoing intelligence needs of your analysts and decision needs of your executives.

- Develop an understanding of the need to support analysis activities occurring throughout the organization
- Gain basic exposure to the top 12 essential analytical techniques, competitor profiling featuring the four corners, driving forces analysis, industry analysis featuring the nine forces, PLC, scenario analysis, and STEEP
- New Market or Segment Entry with Existing Products and Services
- Pre-launch innovation and creative market testing insights
- Communicating value, managing process change and transitions from standard business and product development models

4:30pm:
Influencing the C-Suite

Organizational transformation through CI

One often cited complaint from strategic intelligence professionals is that their analysis isn't valued by their key executives, and they are viewed as an overhead function. This presentation will highlight a real-world case study of the Strategic Intelligence team at NetApp, who have became a key partner for their executive staff and key functions, and an key enabler of the corporate transformation currently going on there. Participants will be able to walk away from this session with a roadmap for building a Strategic Intelligence team, that can become a strategic partner for the business, and who executives turn to for critical outside-in perspectives.

5:30pm Networking Reception

DAY 2- THURSDAY, SEPTEMBER 20TH, 2018
7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:
Product Experience Matters

Gain insights and an intelligence baseline through a day in your customer's eyes

- Gain insights by analyzing your customer and users product touch-points and journey
- Identify motivations behind user behavior and expectations to better innovate and frame your product
- Encouraging "experience thinking" collaboratively throughout your team, stakeholders and organization

9:30am 15 Minute Networking and Refreshment Break

9:45am:
Competitive Intelligence Battlecards Workshop

At its core, a battlecard is a tool for helping sales teams win the hearts and minds of their prospective customers. Unfortunately, the battlecard author loses sight of this purpose, leading to reports that fail the "so what" test. This session exposes two common problems with battlecards, "digestion" and "implementation", and provides real-world techniques for making information "scannable" and "actionable". This session then examines the value of aligning objection handling with buying criteria developed from Win-Loss interviews to yield concrete, useful recommendations to help sales teams deflect customer interest in a competitor's strengths and focus customer attention on a competitor's weaknesses.

10:45am 15 Minute Networking and Refreshment Break

11:30am
Connecting the Competitive Intelligence Dots

This session will focus on "Where you are," "Where you're headed," and "How you'll get there." Audiences will identify where they are on the competitive intelligence horizon, how they compare with their CI peers, information sources that lead to action, and research methods and their corresponding effectiveness.

12:00pm Lunch

1:00pm
Competitive Wargaming and Simulations Workshop

Develop situational awareness of competitive position

In the real world, most competitive issues are usually focused on tactical and operational problems or responses to emerging competitive threats rather than "grand strategy" initiatives that require external support and guidance to make actionable. This is why the hottest trend in business wargaming today is "skilling up" teams of internal facilitators with the ability to take on tactician support roles for exercises attacking the following seven (7) business problems:

- Product Extensions and New Feature Design
- New Market or Segment Entry with Existing Products and Services
- Reacting to New Competitors with Asymmetric Market Power or Resources
- Anticipating Disruptive Threats to your Business Model or Industry Structure
- New Leadership Changes at Major Incumbent Competitors or your own Company
- Mergers, Acquisitions and Alliances to Fortify Talent, IP or Product/Feature Development
- Addressing Shifting Customer Needs/Wants Ahead of Competitor Reactions

In this workshop, we will introduce these seven specific applications that can be most commonly addressed by internal wargame tacticians. Every master strategist or tactician started out as a novice so, join this exciting presentation and begin your journey toward making wargames and competitive simulations more accessible and actionable in your organization.

5:00pm Adjourn