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Intelligence and Creative Competitive Intelligence

1.1. Supplying intelligence

Carrying out intelligence requires the employment of several technologies, such as but not limited to those linked to the Web. There are also situations in which we may bypass technology in order to go back to basics: the purely human capacities to understand, investigate, collect, treat, analyze, format and disseminate information. Even if nowadays there are tools that are highly efficient and despite the fact that a great quantity of interesting information can be found on the Internet, the fact remains that the individual and their abilities are at the heart of creating an adapted and relevant intelligence system. I would also add that from the point of view of an expert in charge of collecting information, intellectual capacities are sought after without really relying on technologies when in the phase of understanding the problem posed as well as that of identifying the relevant sources of information. In this way, the first problem with which the intelligence expert is often confronted concerns identifying the informational supply to search for, in order to produce a satisfying response for their partner.

In fact, information investigation generally at least implies searching on the Web. Or in simpler terms, searching for information or for sources of information on the Web, which points to the problem of creating a series of queries to be entered into a search engine. However, before launching into a search engine blindly, it is definitely preferable to reflect on the question and to carefully create one or several queries which will then be adapted and

entered into one or several search engines. Consequently, it is necessary to have already selected the search engine(s) that will be used. As you already know, a rigorous intelligence expert cannot be satisfied with a search engine chosen by way of default. In the same way, before embarking upon investigations which will take a long time, we must have fully understood what was initially asked. This corresponds first to the specifications, which must be met in order to satisfy the request-maker. In order to do this, like every list of specifications, it must be created equally between the two parties: that of the request-maker(s) or receiver(s) and that of the creator(s) of the intelligence or intelligence system. Nevertheless, in terms of intelligence, a perfect list of specifications is impossible to establish. There will always be some ambiguities and different ways of interpreting the request which are left at the discretion of the intelligence expert. This is why, in order to fully understand the informational need to which we must respond, an intelligence expert must identify and explore the informational need hidden behind the informational request that was transferred to them. To do this, the intelligence expert must first have an explicit and reasonable informational needs document at their disposal.

Concerning the explicit part, it is about having a list of needs which does not cover a specific theme (competition, technologies, trends, legislation, etc.), but which instead targets responses to apply or a series of questions which the informational provision must clarify or bring an adequate response to [BUL 14, p. 53]. Thanks to this type of document, the intelligence expert reduces interpretation ambiguities which are inevitably linked to requests which use generic terms such as “put a strategic intelligence system into place”, “carry out competitive intelligence”, “undertake technological and sector-specific intelligence”, etc. By focusing on provision and its usefulness, the intelligence expert can easily realize if they do not understand what is expected of them or if a suitable response will be put forward. To get there, it is convenient to question the receiver by asking them questions such as “why are you doing this?”, “what objectives are you aiming to fulfill?”, “in order to respond to what questions, for example?” In fact, in the majority of cases, making examples of provisions to produce or employing information for more explicitness can prove to be of great use in order to better discern the needs of an intelligence system.

In terms of the reasonable aspect of the document of need, it must allow the intelligence expert to signal and to conclude, according to the amount of time that they are given as well as their abilities and means at their disposal, whether or not they can respond to the request effectively. This may be the case for a cartography request with competitive principles for a company, which includes their profile and a monitoring of their actions. In general, this type of work cannot be reasonably carried out by a single person in a single day, unless part of a type of pre-programmed package which the intelligence expert already has more or less at their disposal. If the request is above all that concerns theme, for example, "put a technological competitive intelligence system into place which responds to the needs of a R&D service", the intelligence expert must link this request with an explicit and reasonable formulation of informational needs to be fulfilled. Even if they are granted full rein as an intelligence specialist, they must be able to take the time to locate the recipients of their work, understand their needs and formulate with each one of them explicit documents of specific provisions as well as numerous other criteria such as quantity, frequency and the form of information to provide. It is unimaginable to carry out this work without locating the recipients of the information, obtaining the technical information and preliminary knowledge about what is created using the R&D service, or spending a few weeks to properly establish the needs and adjust the provisions.

As stated earlier, this process of making the informational needs more explicit is as relevant to requests for information and intelligence investigation which will exploit the Web as to the others, that is to say those which do not target the Web or are not limited to information found on the Web. Whatever the details of the request, every reflection that aims to make the useful response more explicit stays the same. The use or non-use of search engines, the use of an original flux RSS aggregator, the exploration of a database with the use of a *data mining* software system or its use at trade shows are only a few of the possible applications. Every element is needed in order to collect information effectively, to fully understand the need that these actions are meant to respond to. In this way, every information researcher or intelligence expert must be capable of putting strategies in place to better understand the demand and informational need of their request-maker.

Unfortunately, as it has been expressed notably by M. Mugur-Schächter [MUG 07] and B. Simonnot [SIM 13], information is an ambiguous and complex notion which in the framework of intelligence too often provokes misunderstandings and provision errors. Making the request more explicit is thus absolutely necessary and must pass through clearly identifying the needs of the real request-maker while avoiding intermediaries. When the request is complex, the needs must be put into an explicit hierarchy. By default, it is up to the intelligence expert to propose ideal responses to their request-maker that they will be able to produce. Generally, a discussion surrounding these provision propositions will have the advantage of refocusing, rendering the need more explicit making it more about the practical usage of information to look out for and the likely responses that they could bring. It may also shed light on the context of the informational request which is made and predict, in an ideal situation, what would be the best result to propose. The strategic reflection framework presented in the introduction (Figure 1.1) can serve as a model to follow in order to automate this very delicate first part of understanding an informational problem which the intelligence expect is responsible for solving.

Obviously, these problems can also be posed in the context of putting creative competitive intelligence into place, even if this form of intelligence most regularly imposes an additional process. In order to further explore the problems posed by understanding an informational need, whether it be linked to a more traditional intelligence framework (strategic, competitive, technological, legislative, etc.) or creative competitive intelligence, I will call upon two series of illustrations, starting with those in Figure 1.1. In this way, as already mentioned, the first problem to be dealt with when we try to understand an informational need in order to create an adequate response consists of limiting the difference in understanding the problem between the recipient on one side and the intelligence expert on the other.

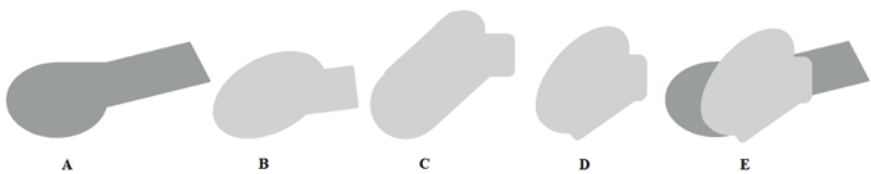

Figure 1.1. *Difference in knowledge between the thoughts of the request-maker (A) and the final product (D)*

In the series of illustrations shown in Figure 1.1, A represents the field of informational investigation that the request-maker thinks about. They have identified the need themselves. B shows what is eventually expressed as the informational need to the intelligence expert. C demonstrates what the intelligence expert has understood (of course, another intelligence expert would have interpreted this differently) and in D, we see what the intelligence expert has been able to produce after the information retrieval, verification, treatments and formatting. In contrast, E presents the different areas of investigation identified by the request-maker which are not found in the response that was created. In order to avoid this type of problem, an intelligence expert must be able to have discussions with the request-maker, asking additional questions and if necessary, leaving them the chance to adjust their response so that they can better understand the needs of the request-maker during the project. Intermediaries, which separate the two sides, must also be kept to a minimum since the gap between real informational need and the request eventually created will increase with the number of people for whom the request will pass through. If the intelligence expert has the time to improve their bank of information, through repetitions and regular feedback with their recipients, it is obvious that their understanding of the needs will look more and more like illustration A in Figure 1.1. But not everyone has the luxury of several months to refine their understanding of each one of the intelligence requests.

With this taken into consideration, there is another problem which emerges in terms of the collection of information. This problem corresponds, on the one hand, to the gap that will separate what we wish to provide from what we successfully provide with regard to the needs of the request-maker and, on the other hand, to the gap that will separate the proposed informational provision from the ideal informational provision that would have been provided. Figure 1.2 illustrates some cases of intelligence provision which can be carried out by linking them with the wishes of the request-maker, the understanding of the intelligence expert and the ideal provision that can be carried out.

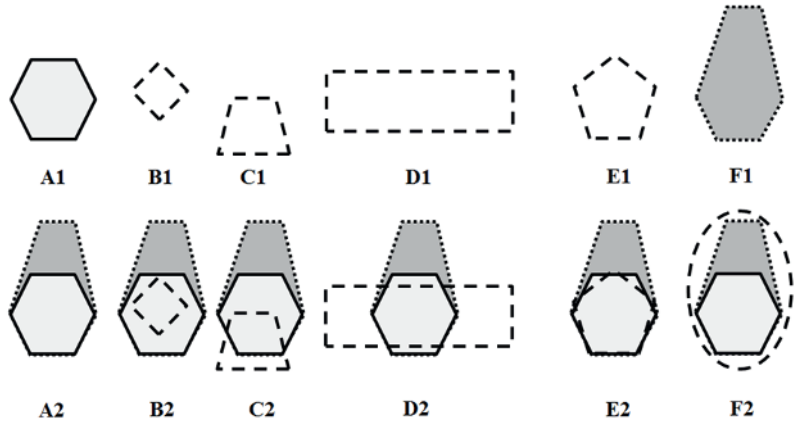

Figure 1.2. *Different cases of informational provisions with regard to an identified need and an ideal provision*

In Figure 1.2, A1 illustrates what the request-maker has identified as the informational need and wants to be the provision of information, even if there may be certain difficulties in expressing this request (as in the case used above). F1 shows the ideal provision of information, which would allow us to respond to all of the informational needs of the request-maker included in their request or hidden by it. As it has probably already been noted, there are many cases where the intelligence expert can provide very relevant informational elements which the request-maker would not even dream of. As a general rule, the request-maker is not considered an expert in information retrieval, as they can demand things that cannot be realized, but they may also underestimate the ability of the intelligence expert.

In A2, illustrations A1 and F1 overlap to effectively show their similarities and differences. When we ask an intelligence expert for information, we must try to be as close to A1 as possible, and if possible approach F1. B1 and C2 represent the informational responses in terms of intelligence provision, which does not respond to the request. The advantage of this type of provision is that the request-maker will be disappointed very quickly. B2 to C2 represent their position in relation to the request as well as the ideal informational supply. Response B1 is too limited (B2) and must be more detailed while that of C1 is moved (useless information have been provided and others have been ignored) and so must be redefined (C2). Responses D1 and E1 must satisfy both, but response D1 brings forward a

lot of useless information, even though it has allowed us to find one or two pieces of information that were not requested, which satisfy and positively surprise the request-maker. However, this work can be improved, because it requires too much time (investigation and sorting for the intelligence expert, reading and assimilation for the request-maker). This process comes up with too much superfluous information. We may also see from this figure that some requested information has not been provided. In E1 and E2 alike, we note an effective intelligence process that corresponds nearly perfectly to the request. This is a classic example of professional intelligence. Finally, F2 shows, through the dotted line, what a truly effective intelligence process should look like, even if it has to be carried out in two stages. First, a classic intelligence process (E1), and then, in order to clearly present things, an additional supply going towards F1. Extending the field of investigation of a traditional intelligence process is what should allow us to come to a strategy for creative competitive intelligence. Information must be proposed in order to fully satisfy the request (E2) and then extend this supply to approach the ideal informational supply, which is very difficult to define. A creative competitive intelligence process thus must be aimed in the right direction to avoid ending up in the case of D2. Nevertheless, to get there, a creative competitive intelligence process systematically takes more time and will inevitably produce more superfluous information and then a classic intelligence process. A creative competitive intelligence process thus takes place with a well-framed intelligence process (E2) when the working conditions allow it or need it. On the contrary, creative competitive intelligence does not overcome the problems posed by expression and understanding informational request (Figure 1.1). The creative part of the request must also use additional pieces of information to ensure that it does not distance itself too much from the assigned objective.

Lastly, as evoked above, there is one remaining dimension to take into account when putting an intelligence system into place: linking the provided information with the decisional process. In a certain way, it is about providing the means to improve or at least maintain the level of relevance of the information provided by the intelligence processes carried out throughout the period. It is a quality approach applied to the intelligence system which must be put into place. The contribution of the provided information in the decisional process must be estimated on a scale that goes from

"useless" to "decisive". In fact, when we wish to put an effective intelligence system into place, we should start using the definition of the system, examining the contribution of its information that will be put forward for the decisions of the organization. However, when we have little time or even when we find ourselves among a rather small structure, we generally tackle analysis of the informational contribution only once since the intelligence information has already been collected. The advantage of this type of planning is that it allows for empirical adjustments of the intelligence already in place.

In order to estimate whether some elements must be changed in the intelligence system, a few questions should be asked such as:

– Which information has helped and why?

– Which information has not been useful and why?

– Can you improve the relevance of the information already provided?

– Among the information provided, has there been anything that has proved useless?

– Is the information that was deemed useless a year ago still useless?

– Which information provided has had a crucial impact on the strategy or the working of the organization?

- What is the nature of this impact (positive, negative, other)?

- What are the reasons that allow us to explain this impact?

In order to avoid certain problems like those illustrated above, it is important for the intelligence expert to benefit in the best way possible from interviews with their request-maker and recipient of the bank of information. It is thus necessary for them to be well prepared for this type of interview that includes taking notes, which is one of the fundamental elements. In order to present a guide to manage this phase of information retrieval, I have been highly inspired by a diagram proposed by G. Desmaretz [DES 13] about taking notes (Figure 1.3). This diagram allows me to put forward in a single drawing the most important elements of note-taking during a discussion between an intelligence expert and their request-maker aiming to reach a good understanding of the informational need expressed.

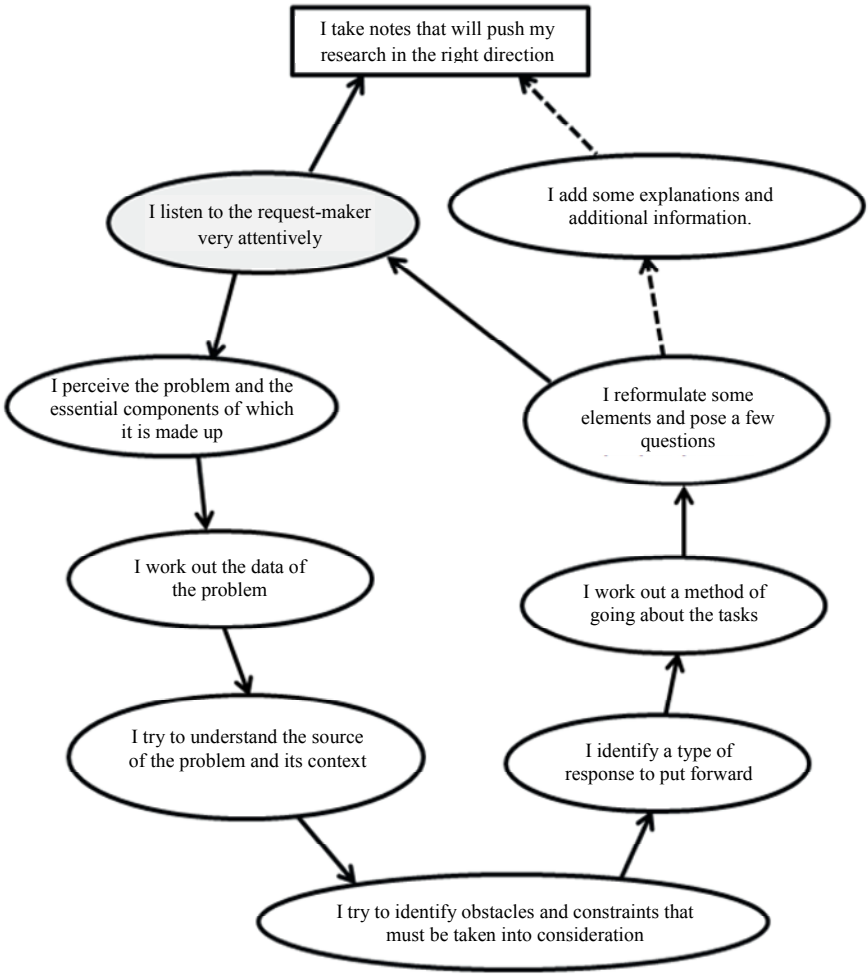

Figure 1.3. *Questioning and note-taking process when in the phase of understanding the intelligence problem (adapted from [DES 13])*

If you find yourself in an unlucky situation where you cannot or can hardly benefit from an interview with the recipient(s) of your information or even the initial request-maker, there is still a method that could help you a little: establish a profile of recipients or request-makers. Profile sheets (section 10.3), which help to record interesting information relevant to the profile of a general request-maker or recipient, allow you to put yourself in

their shoes to better understand how they work, a part of their experience and, above all, their probable expectations.

1.2. Informational supply and creative competitive intelligence

As we have just seen, a proper competitive intelligence project consists of a questioning stage as well as a stage in which hypotheses are made and released in regard to what must be carried out. This stage which is part of understanding informational need requires the person in charge of the competitive intelligence project (the intelligence expert) to suppose that there is, in theory, a gap between what is understood and what is requested. In other terms, the intelligence expert must ensure that there is a real correlation between the informational need expressed and the need that is understood. Moreover, the intelligence expert must also be able to identify the need that is not expressed, using the expressed need and the ideal informational supply which can be proposed in order to respond to the need that was initially recognized. There are thus different ways to tackle the supply of information and these can allow us to classify creative competitive intelligence in relation to other forms of intelligence.

One of the methods that we can employ for questioning objectives consists of placing informational supply on an axis, which allows us to recognize what is expressed by the request and what is implied. If we depart from the principle that the intelligence expert has not misunderstood, another axis may also interest us to understand the intelligence system more clearly: that is to say the temporal aims of informational supply. I can in this way construct a plane where an axis points to a type of intelligence according to when a request is expressed: at the extremes, we see the requests that have been expressed and not expressed with the more vague requests in the middle. If you are asked to investigate innovations and new ideas, you have to use a clearly expressed request associated with an enormous quantity of unspoken words, implicit knowledge, and supposed expectations and often of surprising and exploitable hopes for information (that are not defined). The other additional axis consists of placing into time the type of information to be investigated. Innovation points towards the future, while investigations regarding experiences, past results points towards the past. In the center, we see investigations for temporary information. There are thus six informational categories presented in Figure 1.4.

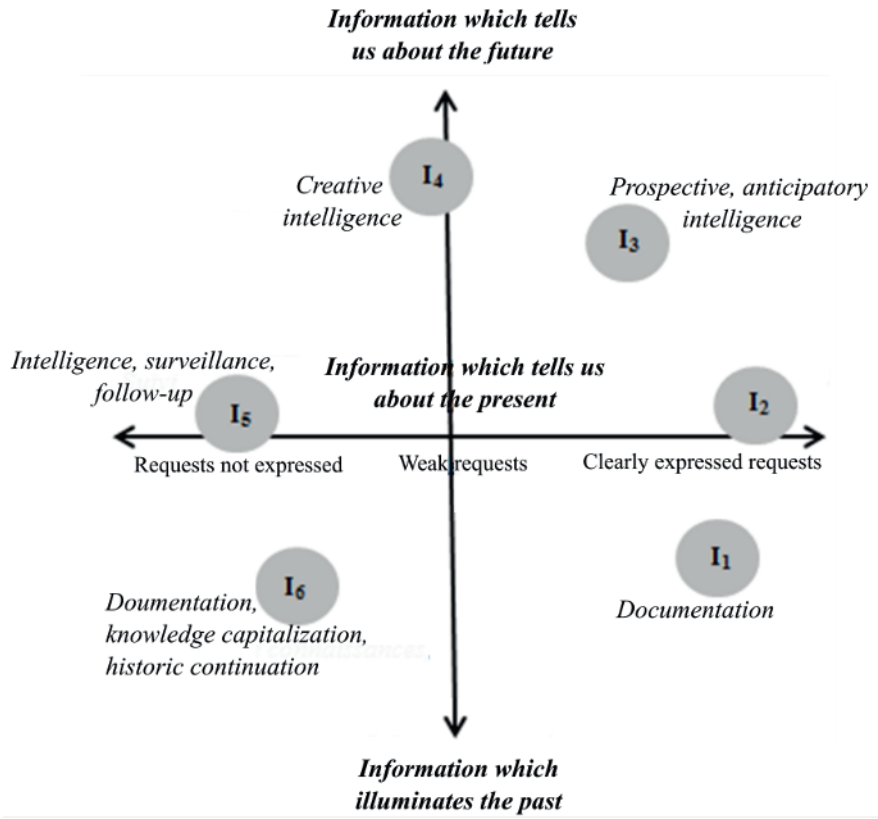

Figure 1.4. *Positioning of different information supplies according to the time and the clarity of their request*

From top to bottom, in other words, starting with information retrieval pointing towards the past, we see classic documentation that responds to clearly expressed requests (I1) and informative research that needs to be made more explicit (it can enter a process of knowledge capitalization that we must thus define then research) or even investigation surrounding historical cases which appear throughout the years, throughout implication, digitalization or case identification processes. Then, we can tackle the specific information that is more short term. With this aspect, we erase documentation in order to come to the most widespread intelligence case. We try to follow the information week by week, day by day and minute by minute in order to be informed of everything that may interest us in order to make a decision or to respond quickly. We find, in this context in particular,

competitive intelligence systems, product and image, which according to the sector of activity and the spectrum that has to be considered, can constitute a clear informational request (observation of direct competitors, competitive products, opinions of consumers), a vague request (monitoring of positive and negative perceptions of current or potential customers, trends and methods of indirect competitors) or which require explanation or a creativity period (monitoring of potential replacement products, future new players, future customer expectations). Finally, we turn towards the future with explicit informational requests, at least perceptible at that moment. I propose placing prospective informational supplies there as well as anticipatory intelligence systems (I3) which bring clearly defined elements forward (technologies, regulations, new markets, etc.). When the objective of the research points towards the future when it is very ambiguous and rather generalized (find new ways to innovate for example), we find ourselves in the context of creative competitive intelligence (I4).

This figure also allows us to define creative competitive intelligence without calling upon the terms creation and innovation. With the help of this diagram, creative competitive intelligence can be understood as a form of intelligence which distinguishes itself from other forms of intelligence, due to the fact that it concentrated on needs that have not been expressed, or badly identified and which will allow us to be able to reach information, which will tell us things about the near future, from 1 to 7 years away according to the situation and the fields of application. The methods used for creative competitive intelligence can also be employed to carry out intelligence which is more short term or anticipatory. Nevertheless, it should be brought to our attention that creative competitive intelligence can also be assimilated to short-term intelligence, or even historical intelligence, when the qualitative word “creative”, which is associated with it, is used to characterize the sector of activities that it follows or in which it draws information. These are the creative sectors which are generally associated with part of the population which is called the creative class.

1.3. Creative class and creative competitive intelligence

Since the 1990s, with the arrival of the Internet, competitive intelligence and knowledge management, our society has become a society of information and knowledge. Since then, different analyses have brought transformations resulting from this type of society to light which has ended

up creating a truly creative economy. According to certain authors, such as J. Howkins [HOW 01], this creative economy is the fruit and the resource of a section of society whose principle contributions are ideas. This part of society would take the name "creative class" and would be composed of two sides. On the first side, we find professional categories that work on developing new ideas: researchers, engineers, designers, artists, architects, etc. On the other hand, there are professionals who work to solve complex problems linked with the creative class of the first side: legal practitioners, corporate lawyers, bankers and investment bankers, doctors, technicians, etc. In this context, the existence of creative competitive intelligence can be justified by the fact that such intelligence is dedicated to monitoring creative sectors at the center of which cultural and creative industries are found [TER 12, p. 19]. Creative competitive intelligence is thus similar to a group of informational investigations which require to examine informational sources which come from the world of art and creation, creative industries that comprise it and creative sectors in which they are taken as catalysts.

These creative sectors are very numerous. The *Institut des deux rives* [INS 09, p. 18], like other authors and *thinks tanks*, have tried to create an inventory that includes:

– the arts (painting, sculpture);

– the art market and antiques;

– architecture and urban planning;

– publishing (philosophy, literature, poetry, fiction, essays, comics, visual arts (cinema, photography, television));

– crafts (jewelry, goldsmithery, culinary arts, etc.);

– music (editing, composition, concerts, festivals);

– performance art (theatre, dance, circus);

– fashion (high fashion, luxury);

– design, gastronomy and wine;

– creative tourism (guided tours, theme parks);

– advertising (digital, public relations);

– digital creations (multimedia, software programs, telecommunications, video games).

Browsing this list makes us want to add even more sectors to it. For example, the gaming sector in its entirety deserves to be represented as well as all of the engineering sectors since they imply the presence of R&D phases. Unfortunately, when using this reasoning, it is practically all of society who will be represented. In order to somewhat limit this potential group, we can take into consideration the principle objective of creative competitive intelligence, whether it is about following creators, initiators (first users, participators or informants) or the kinds of creations that are emerging, those that stagnate, those that decline, etc. In this way, case by case, these are not all of the sectors that will be called upon, but some of them, which will make intelligence work possible for a small group of people, or a single person.

At this stage, I can succinctly describe to you another aspect of creative competitive intelligence which is between intelligence in creative sectors and intelligence geared towards the future. Creative competitive intelligence is a type of intelligence whose objective is either to inspire creative individuals of an organization, or to be able to signal opportunities for innovative developments for the strategists of an organization. In the second case, creative competitive intelligence aims to investigate and identify what W.C. Kim and R. Mauborgne [KIM 08] call blue oceans. I explain this metaphor and some tools which are linked to it in section 6.4. Nevertheless, I will talk about it quickly here to give a brief idea. This metaphor of blue oceans comes from fishing. There are red oceans which correspond to fishing spots that have been overexploited in which the number of fishes is large, but considering the number of fishermen (actors) in this sector, is relatively weak, competition is fierce and there is not really space for new participants. From this point of view, creatives, certain members of the creative sector like marketing specialists, share a common goal: they look for creation zones which are unexploited or neglected. The ocean blue strategy advocated by Kim and Mauborgne simply states that when we are by a red ocean, we must look elsewhere in order to discover a blue ocean before the latter also becomes a red ocean. Creative competitive intelligence can help to bring red and blue oceans to light, as much from a marketing point of view as from a creative one. The main thing is to use the right tools according to the objectives that have been assigned.

1.4. Creative competitive intelligence, objectives and means

As I have just shown from the spectrum of creative sectors in society, creative competitive intelligence can emerge from almost all sectors of society, if we aim to observe new ideas, new solutions and new talents that can come from them. If we were to pursue this reasoning further, creative competitive intelligence must be able to recognize, before others, according to associated objectives and targets, certain new talents, new ideas and new solutions. It must thus be able to not only access information and knowledge of industries and creative sectors, but also identify changes that take place and those which will have an impact on the "less creative" sectors of society. In short, creative competitive intelligence must be relevant for all sectors and, by way of consequence, also for the individuals, solutions and ideas that come from it. Yet since these sectors practically spread across all of society, it seems that potential for developing creative competitive intelligence is rather immense.

Finally, as I already expressed in the introduction, creative competitive intelligence is a type of intelligence which can be interpreted in five different ways. In the first case, creative competitive intelligence is defined as classical competitive intelligence, but systematically uses some creative techniques to make it more effective, like those of questioning (Chapter 5), notably during the phase of understanding informational problems that it may resolve. In the second case, we may consider that creative competitive intelligence is a kind of intelligence which specifically aims to monitor the emergence of new ideas, new products, discoveries in every domain and innovations. This type of intelligence is very similar to other forms of intelligence, except that in order to be effective, it requires us to fully understand the creativity and innovation processes. In this way, a person who carries out creative competitive intelligence must recognize the life cycle of a product, within innovative conditions or creative techniques, in order to be able to imagine solutions which creatives, technicians, managers or engineers would have thought about or even in order to be able to define indicators allowing us to recognize whether such a creativity or innovation method is being implemented by certain people in a given sector. Identifying weak signals (Chapter 2), formatting trends (Chapter 3) and employing inspiration techniques (Chapters 6, 7 and 8) used by engineers or creatives, for example, are several ways which will characterize creative competitive intelligence, should the subject of this intelligence focus on creations or innovations.

According to the third interpretation, creative competitive intelligence can be understood as a kind of intelligence which aims to directly contribute, through informational contributions, to the implementation of a creativity or innovation process. Obviously, the principles of the first interpretation of creative competitive intelligence can be taken once more, but not to the full extent. If it is dedicated to creatives, some of the information released must have the objective of inspiring them or providing them with all other information or formatting of information likely to help them in their creative work. It will in this way involve formatting information in the form of trend boards (Chapter 3). If it is dedicated to an innovation process, the principle remains the same, but it will also employ other techniques in order to better ensure the success which characterizes innovation. Research, updating and monitoring the profiles of individuals (Chapter 10) will be an example of this type of tool which helps produce creative competitive intelligence. A fourth way to consider creative competitive intelligence is to take it from the viewpoint of the specific domain it observes. This domain is that of creation. Creative competitive intelligence is a form of intelligence which is particularly interested in the worlds of creation. It is about recognizing not only new effective ideas, but also their creators, their supporters and promoters as well as the new audiences. Dynamic implementation of networks (Chapter 4) linked to a creative sector is thus a means to carry out creative competitive intelligence. Finally, the fifth way to see creative competitive intelligence is to employ it as an extension of competitive and/or strategic intelligence. In this sense, creative competitive intelligence aims to help strategists imagine new avenues of development, new opportunities or potential risks that other means struggle to reveal. From this viewpoint, we aim to form in the most rigorous way, information allowing us to reflect on future possibilities within the next few months or years. It is in this context that *gamification* and *disengamement* (Chapter 9) techniques will perhaps be used. It is also within this context that intelligence must be directly involved with a process of creativity or innovation. Intelligence must feed information into a group of creativity or decision, which itself must generate new requests for information retrieval and so on. Subsequently, intelligence relies on rooms dedicated to collecting and representing information (in other words, the conclusion).