

How to Screen Candidates for the Competitive Intelligence Manager's Job

by *David Lithwick*

Hiring a CI Manager can be extremely time consuming, unless you adopt a brutally honest approach when evaluating candidates.

A detailed evaluation sheet for each interviewee should be completed to ensure that the Manager you select possesses the necessary toughness and command posture to help level the playing field.

The objective of this article is to provide the reader with 5 key hiring guidelines as well as an evaluation sheet for screening CI Manager candidates.

Tips

1. Ask yourself whether the candidate has the passion, toughness, and

discipline to successfully manage the CI department.

2. Recognize that a commitment to forensic investigation, fast turnaround, and meticulous information management are critical requirements for the CI manager to have.
3. Probe your colleagues on whether the candidate has the drive to exploit competitor weaknesses.
4. Have the candidate complete a series of CI exercises including writing a CI backgrounder for your business plan and using a career ad to reconstruct a competitor's org structure. **(Figure A)**
5. Set up a "mock trial" requiring the candidate to defend why a CI department should be set up,

despite past failures. Be ruthless in your questioning. This will help determine whether he/she will "stick to their guns" or be a quitter.

6. If we equate CI and marketing research to medicine, the CI Manager would head - up a specialized department such as pathology, while the Marketing Research Manager would oversee hospital administration.

Specialists represent a minority. Extreme care must be invested to select the most appropriate candidate. Frequently companies interview 80 to 90 candidates and still come up short. Incorporating evaluation sheets helps speed up this process **(Figure B)**

Figure A: CI MANAGER EVALUATION SHEET – BASIC INFORMATION

Candidate's Name:	_____	
No. of years of CI experience:	_____	
Professional CI courses taken:	_____	
Association memberships:	_____	
Companies where candidate has worked in CI:	_____	
Positions Held:	_____ CI Director	_____ CI Analyst
	_____ CI Manager	_____ Field Investigator

Figure B: CI MANAGER EVALUATION SHEET – BACKGROUND INFORMATION

Electronic CI

Article searches	Yes	No
Trademark searches	Yes	No
Website Scans	Yes	No
News release scans	Yes	No
Creating a site on an Intranet	Yes	No
Moderating a discussion group online	Yes	No

Documentation CI

Brochure	Yes	No
Price Lists	Yes	No
Point of sale literature	Yes	No
Newsletters	Yes	No
Stockbroker reports	Yes	No

Data Analysis

Data cell screening	Yes	No
Data consolidation	Yes	No
Data clarification	Yes	No
Data verification	Yes	No
Data indexing	Yes	No

Field Investigation

Retail mystery shops	Yes	No
Phone centre mystery shops	Yes	No
Corporate sales mystery shops	Yes	No
Competitor interviews (mgmt)	Yes	No
Competitor interviews (svc reps)	Yes	No
Competitor interviews (sales reps)	Yes	No
Competitor interviews (buyers)	Yes	No
Competitor trade show interviews	Yes	No
Competitor assoc. meeting interviews	Yes	No
Retail customer intercepts	Yes	No
Internal audits – sales	Yes	No
Internal audits – customer service	Yes	No
Internal audits – tech support	Yes	No

Competitor Marketing Platforms

Pricing Data	Yes	No
New Product Data	Yes	No
Acquisitions Data	Yes	No
Training Data	Yes	No

Competitor Re-Engineering

Market share	Yes	No
Pricing discounts	Yes	No
Organization charts	Yes	No
Phone center process	Yes	No
New customer subscriptions	Yes	No
Marketing budgets	Yes	No

Management

Training staff to carry out CI	Yes	No
CI newsletter	Yes	No
Cross-department network	Yes	No
Mystery shops	Yes	No
Budgeting	Yes	No

Report Writing

Brief	Yes	No
Rush investigation	Yes	No
Monthly activity scans	Yes	No
Risk assessment	Yes	No
Internal needs assessment	Yes	No
CI plan	Yes	No

Open – Ended Questions:

- How can you help improve our CI department?
- In your present job, what major CI initiative have you recommended and acted upon?
- What would be your first task to consolidate information scattered across departments?
- What would you do to overcome cynicism when faced with co-workers who are critical of creating a CI system because of past failures?
- What makes a CI department successful?
- Rate each of the following CI Managerial skills in order of importance:

_____ Lateral Thinker	_____ Sales Driven
_____ Tenacious	_____ Risk Taker
_____ Analytical	
- How would you use CI to increase sales?
- What budget is needed to run a CI department?

_____ Under \$10,000	_____ \$41,000-\$65,000
_____ \$10,000-\$20,000	_____ \$66,000-\$85,000