Trade Show Intelligence: Intensive, Exhaustive and Fun

By Jonathan Calof, University of Ottawa and Bob Fox

It's a trade show and, as would be expected, collection activity abounds. A look at the floor reveals the following:

- Two government officials work together to gather information; one is from Canada and the other from Switzerland. They are looking at government assistance for companies at trade shows.
- Two other collectors go off to gather information together; one is from government, the other from an association. They are trying to identify what US distributors are looking for in new companies.
- A company executive is off to another booth to gather market information on how foreign companies approach their involvement in trade shows.
- Two consultants working together are combing the floor looking for themes and investigating how products are being branded in the US.
- An association executive is attending a workshop, hoping to learn about new trends.
- Four other people from the same organization are just leaving to go on a tour of local companies, organized as part of the trade show.
- To complete the view, provincial officers, federal government officers, company executives and senior management from two provincial and one national association are fanning out, trying to find out "What's the buzz?"

This is a normal day at a trade show, lots of different people busy gathering information. Closer inspection reveals that all these people are working together as a team, seeking answers to common Key Intelligence Topics. They are actively helping each other complete their plans. These plans come from different companies in different provinces, federal and provincial governments, and associations. There are even consultants there to assist in the gathering of information.

COOPERATIVE INTELLIGENCE

All of them are collecting for a common purpose, bringing the information to a central collator to develop a single database, meeting nightly for information analysis, and receiving a nightly report on the results. They are all participants in an innovative Trade Show Intelligence Mentoring and Training Program. Welcome to Canadian Trade Show 101: Networking and Knowledge Management for Trade Show Intelligence.

In this example, the group banded together to get the most out of a trade show. The association executive was actually gathering for the government while the government representatives were gathering information for the company! The consultants were gathering for the companies, the associations, and the government. A Swiss government official thought that the entire process was so great that he wanted to work with the Canadian official on a joint collection task.

The trade show is the culmination of this unique training program for competitive intelligence (CI) and knowledge management that incorporates training and mentoring with an on-site exercise. The program provides a basic introduction to CI and trade show intelligence, then uses knowledge management concepts with team building to get an entire group helping each other conduct trade show intelligence.

This approach allows smaller companies the opportunity to harness the resources of larger companies to conduct trade show intelligence. It helps the governments form that *seamless delivery* that the private sector has demanded for so long. It helps both national and provincial associations link together their interfaces with their members and governments. In a sense, the program is an introduction to CI and a trade show intelligence consulting project all rolled into one.

The Trade Show Intelligence and Mentoring program addresses two key challenges:

Getting companies, associations, and governments to better manage their trade show information activities.

One of the top reasons for trade show attendance is gathering information to better understand markets, customers, and competitors. As SCIP publication articles have mentioned, conferences provide a great opportunity for collecting intelligence in the shortest span of time, for the least amount of money.

As Prior pointed out, "Properly organized, a competent well-briefed team should be able to gather more useful information than they could ever hope to collect in a full year in any other set of circumstances." Between the speeches, workshops, tours, booths, and delegates, there is an extraordinary amount of information on site.

Further, the trade show is the one place where people truly want to talk about what they are doing. Unfortunately, few organizations approach trade shows with a comprehensive and systematic process to develop appropriate intelligence.

Developing basic intelligence awareness and skill in a way that the participants can relate and benefit from.

Traditional intelligence programs focus on providing general material to all participants. For government and small business in particular, the complaint has been that material does not translate well to their environment and requires customization. This was described in a previous article by the authors. (Calof, Fox, and Nguyen 2002)

To best describe how this program works to address both needs, this article leads readers through the course process using a recent trade show, The Fancy Food Show in San Francisco in January of 2003.

Cooperative training and mentoring enhances the team's effectiveness.

FOUR MONTHS BEFORE THE SHOW

The associations, in cooperation with government officers, approached companies and others who would be interested in the trade show intelligence-training program and would like to collaborate in joint applications at the show. The show selected is the 2003 Winter Fancy Food Show. Information brochures are created and personal contact is made to discuss the program. The companies approached are those most likely to be interested in this industry.

Commonality is established within the participating group through focus on one industry. The government and association personnel approached have an agri-food background and mandates related to trade and competitiveness. They also have an interest in working on team efforts to gather and interpret information.

Selection and invitation ensures that there will be some commonality among participants. This enhances the ability to integrate the team for a cohesive application.

THREE MONTHS BEFORE THE SHOW

Interested companies and others are invited to a briefing session on the program. A 90-minute presentation, delivered via video-conferencing, outlines what the process is about and establishes the expectations of the team members. The intent is to get participants focused on potential trade show key intelligence topics.

TWO MONTHS BEFORE THE SHOW

The participants attend one day of training. The trainer travels to several locations: Vancouver, Edmonton, Saskatoon, Winnipeg and Ottawa. The training program consists of a half-day introduction to the basics of CI and a half-day on gathering trade show intelligence.

The second half-day has participants begin the process of establishing their own CI plans complete with Key Intelligence Topics (KITs), Key Intelligence Questions (KIQs) and Key Intelligence Indicators (KIIs). Participants are challenged to think of all of the opportunities available to collect information at the trade show. They also determine if the information they are seeking can be gathered from another source so as to not waste time at the show.

One participant, when presenting his KITs and KIQs is surprised to find that several members in the room have the answers to his questions. As a result, he and his company decide that they no longer need to attend the show. This is an example of an enormous savings and information sharing at its best.

ONE MONTH BEFORE THE SHOW

Now the mentoring phase begins. Participants send their plans to the trainer for comments. They look for potential ways to combine plans and create new teams. The plans include ideas on sources for collection. Participants look at seminar and workshop descriptions, what companies are listed on the website as already attending the show, and identify ideas that would change their indicators or collection plan.

TWO WEEKS BEFORE THE SHOW

This is a *kill session*. The team gathers to discuss group plans developed in the training session. The idea is to improve on the plans by having the participants rip them apart. What emerges are plans focused on identifying what the team wants to gather and how best to gather it.

At the same time, participants identify the sessions they will attend at the conference. Sometimes the participants become frustrated because individually they cannot attend all the workshops they need for their intelligence plan. But fear not. Negotiations begin among the group as to who will go to which seminars, who will go to what booths.

In the end, all agree to help each other collect information. All workshops are covered, and those attending commit to collect relevant information for all team members. One seminar attendee may be collecting information for six or seven plans — including for their competitors — and getting information on six or seven sessions in return. The value of the process leads participants to commit to a level of cooperation far beyond what might normally occur.

THE NIGHT BEFORE THE TRADE SHOW

At this time all participants gather for a pre-show briefing. Time is set aside for more training and reinforcement of team building. Now they learn about networking, interview techniques, counter-intelligence and ethics. The key is the right training at the right time, and the night before the show is perfect for talking about how to interview as they begin their collection process.

The briefing also addresses the issue of ethics. The SCIP code of ethics is used: no misrepresentation. Participants ask about gray areas. "What if I overhear a conversation in an elevator that addresses one of my KITs, can I use it?" asks one of the participants. The response from the trainer is "NO, we are not skulking in corners, hiding behind trees or playing James Bond. If the conversation on the elevator is providing information required by your plan, then join in. In this way, you can get more information and context for what they are saying." People at trade shows and conferences want to talk.

The second part of the evening moves into project logistics. Participants learn about the forms from which their information is entered into the trade show intelligence database. Schedules are provided for when and where data is collected and when the analysis team meets. Contact cards let the participants know where every member of the team is staying and how to reach them. Finally, the group reviews each plan, offering one more attempt to exchange feedback and plan for information and task sharing.

DAY 1

10:00 – The show begins and collectors are off on their tasks. The trainer spends the first two hours on the show floor identifying areas where plans may have to be modified in light of what is there. Here we expect plans to be changed and new KITs and KIQs to emerge.

12:00 – The trainer and some of the participants meet for a general discussion of floor progress. The trainer spends time during each day finding participants on the floor and monitoring the progress. A booth collection form needs to be developed that identifies specific information to support two of the major KITs. The trainer prepares this with input from the team and they discuss how to sample the 1,150 booths that are out there on the floor.

13:00 – More collection, with the trainer checking again with team members to review task assignments and check on progress. Occasionally, the trainer accompanies a participant to an interview or works with them on how they are picking up indicators to reinforce course concepts.

17:30 – The project collator collects the data forms. Only information that the collectors want shared with the group is entered into the database. Concurrently, individual companies or groups have specific KITs that may involve confidentiality or personal interest. In many cases, they request their colleagues to obtain certain pieces of information, providing them with only partial explanations on the reasons why they need it. Having experienced the benefits of teambuilding and seeing the results of the first day of gathering, the information flows freely.

20:00 – The analyst group meets, reviews the contents of the collection database, and starts processing and analyzing the information collected that first day. The analyst team consists of the trainer, the chief collator, and KIT leaders (anyone who is running their own plan). In this particular case, there were also two individuals who were being trained on how to take on the responsibilities of quarterbacking in future shows.

Attendance at this session provides an opportunity for participants to learn by observing and doing. Some KITs are *put to bed*. Others are modified and still others are dropped. The participants get the next glimpse of the plans' evolution, and a few new questions are asked. The team members modify the plan as they gather information at the show. It is a very dynamic process. The analyst session ends with plan revisions and task assignments for collection the next day.

22:00 – Time for communication! The trainer and analyst team prepare the report of the day's activities, a two-page newsletter summarizing the progress on the KITs and new tasks. Not every participant can attend the analyst session (perhaps due to other commitments) so it is critical that everyone knows where the *class* is with the status of the KITs and their individual work assignments and projects.

This is also a chance to instruct participants on topics they need to keep their eyes and ears open for, while on the show floor. They are urged to send a copy of the newsletter or their own results back to their companies or organizations and determine if additional plan modifications are needed. As well, the plan is sent to headquarters so that they can gather information that is better obtained away from the show.

DAY 2

The same as day one with one important addition. The analyst team has a pre-meeting at 6:30 a.m. to ensure that team members validate the findings of the two-page paper developed the previous night. It gives those that were at the previous evening's analysts meeting a chance to reconsider their conclusions while allowing those that could not attend to provide input. It also provides an informal setting for participants, particularly those being trained to be the quarterback, to ask questions about the process.

Typical analysis sessions move quickly and involve heated discussions. The late evening sessions do not provide the opportunity to ask questions about process. Long dinners in San Francisco provide the perfect environment for these broader discussions. The dinner also serves as an opportunity to debrief participants on the collection activity and make sure that all information collected has been incorporated into the database.

Finally, food has always been shown to be a great way to build a team, have a stronger group after a relaxed exchange on what is working and what is less clear. We break bread together.

DAY 3

The third day sees additional activity. While the actions of the first two days are repeated, the trainer also takes a new template the team has designed to address a new KIT. It will allow the team members to review key information on the individual booths. It is tested randomly on 30 of the booths. With the confirmation that the new template provides, the critical information needed, the team sends out two groups to survey every fifth booth.

The day ends with everyone exhausted, but exhilarated. Virtually all team members have information for the database and all actively support the process. The team asks the trainer to develop some preliminary analysis for the new collection plan associated with booths to determine if more work needs to be done the next day.

THE LAST DAY

It is the last day of the show. Members of a very tired group have their last collection tasks assigned. The trainer follows up with all participants and helps them determine collection priorities for this last day.

But the training is not yet complete. All participants attend a debriefing session at the end of the day. There the trainer assesses the trade booth survey after receiving information successfully collected from one-fifth of the booths and present the interim findings of the plans. It is also an opportunity for all participants to provide additional input into the interim conclusions. The debriefing session is attended by all but two of the team still at the show (the two missing had to tear down their own booth at the end of the show).

Finally, the session debriefs participants about the process, what they liked or did not like, and what changes they would recommend for future shows. The most frequent comments include:

- It was easier to collect information (interview) than I thought.
- It is a good thing that I was focused.
- I liked everyone sharing information and working together – I was able to get more information here than I gathered in previous shows.

The session was scheduled for 30 minutes, but over an hour goes by before the group decides that they all want to go out for dinner. The adrenalin is still pumping and the team meets for an additional three hours over a dinner on Fisherman's Wharf in San Francisco. The process created a strong bond.

Participants learn CI concepts in a familiar environment.

ONE MONTH AFTER THE TRADE SHOW

It's now time for a full debriefing. The KIT leaders prepare a report on each KIT and, where appropriate, distribute it to all participants. During a conference call they discuss findings and recommendations arising from the participants' plans. This is the final chance to input information, assist with the analysis, and discuss the process.

The training lasted four months. Friendships have been made, and information has been shared. By learning through doing, participants have developed an understanding about the concepts of intelligence.

In a trade show environment, participants learn the most about the need to adopt the intelligence plan. Without the KITs, KIQs, and KIIs, participants are overwhelmed at shows and miss valuable collection opportunities. By running through the intelligence cycle each day, they can learn that they had the wrong information now, not waiting until they return home, when it is too late.

Trade shows are the perfect environment to teach about the discipline of intelligence and why it is needed. Providing the training in an environment that participants are familiar with (a trade show in their industry), makes it easy to relate the training to their jobs.

The training approach is catching on quickly in Canada. It has been used for four major trade shows in the last year and commitments are in place for as many as a dozen more in the next twelve months.

The process is intensive, exhaustive and a lot of fun. But then again so is intelligence.

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