

INF 382P: Competitive Intelligence Resources & Strategies Syllabus – Fall 2015

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Unique #: 27732

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TA: TBD

Class Objective:

This business research class is invaluable for anyone working in a corporate setting, or working at reference desk in academic or public libraries.

Students will discover how to locate and use appropriate and accurate business intelligence that will allow you to help companies create a growth strategy, work with business students on class consulting projects, and aid a startup or small business in finding their total addressable market. Students will identify a company's financial and market strength quickly, for the purposes of helping understand, and give direction to others on, the competitive landscape of any industry or market. Students will be assigned hard to define markets to study and learn how to partition the research process so that no market will be too daunting to tackle. In this course, students learn how to "boil the ocean" of competitive intelligence and market research—implying achieving the impossible. Students learn what information is "findable" and what can be guessed at with confidence. Studying markets is not about absolute numbers, but about company and individual character, as well as macro-dynamic trends. The students will also learn about the CI practice and standards of ethical conduct along with how to institutionalize the process within companies and provide this kind of information at a library reference desk. Students will gain skills in searching SEC filings and in using various research management and visualization tools. As well as, gain expertise in the syntax nuances of such business databases as Capital IQ, Factiva and Business Source Complete. Students will also gain an understanding of what resources are worth paying for and what is available for free.

Required Text:

Ioia, M. (2014). *The new rules of competitive intelligence*. Bloomington, IN: Xlibris, LLC.

Required Readings: Available on Canvas under Syllabus - arranged by date.

Buslib Listserv: <http://lists.nau.edu/cgi-bin/wa?A0=BUSLIB-L>

Blogs and Commentaries:

Marketplace <http://www.marketplace.org>

Footnoted (*SEC footnotes analysis*) <http://www.footnoted.org/>

Daily Finance <http://www.dailyfinance.com/>

Additional Resources Passwords: Capital IQ (password provided)

Recommended Texts:

Ross, C. (2013). *Making sense of business reference*. Chicago: American Library Association.

Droms, W.G. (2003). *Finance and accounting for nonfinancial managers: All the basics you need to know*. Cambridge, MA: Perseus Books Group.

Moss, R. & Ernsthausen, D.G. (2012). *Business information: A guide for librarians, students, and researchers*. Santa Barbara, CA: Libraries Unlimited.

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Assignments:

Upload Word and Excel files to Canvas. The due date is noted on each assignment in Canvas and on the syllabus.

- 1. Copy the exact question from the Assignments page into your document and write the answer below it** to make it clear which question or part of the question you are answering.
- 2. Citing sources and search strategy:** Under every question. Quote just the answer, or the paragraph surrounding the answer, and cite it with the following: your search engine, the secondary source and the primary source behind it and the search terms you used to find it.
Answer: “the market is 6 billion and growing”
Using Business Source Complete: Business Week 05Jan15. citing IDC) Searched: (peer to peer” or p2p) and (billion or million)
- 3. Spreadsheet and Table Formatting Expectations:**
 - \$B is Billion, \$MM is Millions, \$M is Thousands. In text you will often see \$K it will be represented as 000. It is best to spell out thousands, millions, billions in text.
 - Keep in millions unless the companies are so small that the numbers are only in thousands.
 - Be consistent in denominations. Note in the spreadsheet. “In Millions” or “In Thousands.”
 - Include commas in numbers.
 - Do not convert millions back to thousands unless you know the actual numbers—in other words, to convert millions that are rounded you would end up putting “zeros” when in fact there are actual numbers there. \$2.3MM is not (or highly unlikely to be) the same as \$2,300M but could be the same as \$2,327M.
 - Format with zero decimal places
 - Use repeatable titles so a spreadsheet longer than one page, will automatically have titles in the first row. Excel> Pagelayout>Print titles.
 - Use Print Preview to see if your spreadsheet is readable in print form.
 - Use Page numbers.
 - Adjust the width and depth of cells to match the importance of the information. In other words, conserve your space to keep information readable.
 - Footnote the source information, rather than put it in the cells—Allow for narrow columns for the footnote numbers next to the cell it is referring to.
 - Use Excel formulas for any calculations, so that revised numbers will automatically correct any dependent cells. In other words, don’t do the math yourself and type the numbers as text, let Excel do it for you.
 - Include your name in the header of any of your work.
 - Use Excel help to learn the many things it can do. There are also Youtube videos.

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Grading:

Each assignment has a point value and a weight. You'll find weights on the syllabus and point values in the assignment section of Canvas. The course grade will include the following components:

Company Research	30%
Pundit Report	40%
Final Project	<u>30%</u>
	100%

The course grade will be computed as follows. Grading is based on mastery of course material, attendance, and completion of assignments. **I DO NOT ACCEPT LATE ASSIGNMENTS.** Class grade curves are generally avoided. Normal rounding rules apply (e.g. 89.50 is an A-; 92.50 is an A).

A	93.0 and above	Excellent - indicates mastery, professional level
A-	90.0-92.4	
B+	87.0-89.4	
B	83.0-86.4	Good - respectable level for business environment
B-	80.0-82.4	
C+	77.0-79.4	
C	73.0-76.4	Average - marginal for business environment
C-	70.0-72.4	
D+	67.0-69.4	Insufficient mastery - unacceptable for business environment
D	65.0-66.4	
D-	63.0-64.4	
F	62.9 and below	Unsatisfactory (Failing for Pass/Fail)

Assignment grades will be posted on Canvas and you are welcome to raise questions about potential data entry or calculation errors with me as they are entered. **You will NOT receive credit for late assignments.** However, the final grade assigned in the course is an informed and **final** evaluation and not open for discussion or negotiation. Any lobbying efforts (i.e. asking for a higher grade because you want one, need one, etc.) will not be tolerated.

To respect each student's privacy, individual grades are never discussed over email or phone. You may email me with concerns about missing grades, but if you wish to verify a specific grade, you must meet me in person.

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Class No	Date	Topic	Readings	Search Assignment Due	Weight
1	9/1	Overview: What is CI? Basic Business Concepts Corporate Structure SEC Filings Assignment Overviews	1. Ioia, Ch 2-9 2. Ross, Ch 1 - Canvas 3. Corporate Hierarchy 4. SEC Filings		
2	9/8	Basic Financials Company Analysis Market Analysis Venture Capital Prospectus Exercise-discuss	1. IBM Guide to Financial Statements 2. Droms, Ch 3 - Canvas 3. PE Industry Overview	A-SEC 1-17	10
3	9/15	Guest Speaker/Training: Scott Ulrich, CapitalIQ Subscription Resources	1. Ross, Ch 2- Canvas 2. Ioia, Ch 11 3. Subject Guide	A-SEC 18-20 B-Prospectus	5 5
4	9/22	Visualizing Data Pivot Tables Market Sizing Analyst Reports Statista/Census.gov/Enigma.io	1. Ioia, Ch 12 2. Presenting Info Using Charts 3. Your Graphs Look Like Crap 4. Pivot Table Tutorial	C-Non SEC	10
5	9/29	Financial Forensics e-Statements, Norms & Ratios	1. Droms, Ch 6 - Canvas	D-Market Size	10
6	10/6	Guest Speaker: Crystal Piescle, Market Awareness Primary Research		E-Competition 1-5	10
7	10/13	Guest Speaker: Kirk Cesari, Cesari & Reed Patent searching	1. Guide to Patent Searching 2. Patent Searching Tutorial	E-6-7	5
8	10/20	Guest Speaker: Jeni Putalavage-Ross, Sprinklr In class work	1. Twitter for CI	E8-10	5
9	10/27	Market Map - Magic Quadrant In class work	1. Magic Quadrant Methodology		
10	11/3	Class Presentations of Pundit Report		F-Pundit Report	10
11	11/10	Guest Speakers: Client Presentations Client Interviews			
12	11/17	Guest Speaker: Ryan Field, IC2 Institute Ethics	1. Ioia, Ch 13		
13	11/24	In class work			
14	12/1	Class Presentations of Final Project		G-Final Project	30