

INF 327E: Competitive Intelligence Resources & Strategies

Syllabus – Fall 2016

INF 327E: Competitive Intelligence Resources & Strategies

Unique #: 28050

Room: UTA 1.204

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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:

Loia, 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 files to Canvas. The due date is noted on each assignment in Canvas and on the syllabus.

1. Upload all files at the same time to Canvas. If you add a file later, it replaces the first file. Check to make sure all the sections of your assignment have been added to Canvas and are available for grading.
2. 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.
3. Cite your sources. Use APA style guide. If you get a report from a database, cite the name of the report, the author, and the database. Only include the URL for articles and reports found online for free and not in the subscription resources. Provide the page number.
4. Spreadsheet and Table Formatting Expectations:
 - \$B is Billion, \$MM is Millions, \$M and \$K are Thousands. It gets confusing because you see also often see \$M representing millions. You will also see 000 in tables and this means thousands (so you add the 000 to the number given). It is best to spell out thousands, millions, billions in text or at least make note of it once. Make sure you understand what the source is providing especially if you are comparing two different sources.
 - 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.”
 - Format with zero decimal places
 - 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 \$2,300K but could be the same as \$2,327K.
 - 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.
 - Use Excel help to learn the many things it can do. There are lots of YouTube videos.

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Grading:

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

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.** 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.

Students with disabilities may request appropriate academic accommodations from the Division of Diversity and Community Engagement, Services for Students with Disabilities, [512-471-6259](tel:512-471-6259), <http://diversity.utexas.edu/disability/>

Student Honor Code:

"As a student of The University of Texas at Austin, I shall abide by the core values of the University and uphold academic integrity." 100

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Class No	Date	Topic	Readings	Search Assignment Due	Points
1	8/30	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	9/6	Basic Financials Company Analysis Market Analysis Venture Capital Analyst Reports	1. IBM Guide to Financial Statements 2. Droms, Ch 3 - Canvas 3. PE Industry Overview 4. Role of Research in VC - Canvas	1-Company Overview	250
3	9/13	Subscription Resources Capital IQ training Association/Gov Agencies	1. Ross, Ch 2- Canvas 2. Ioia, Ch 11 3. Subject Guide	2-Compnay Financials 3-lbank Reports	100 250
4	9/20	Search Strategy Visualizing Data Market Sizing	1. Ioia, Ch 12 2. Presenting Info Using Charts 3. Your Graphs Look Like Crap	4-Subscription Resources	300
5	9/27	Pivot Tables Tableau practice Financial Forensics e-Statements, Norms & Ratios	1. Pivot Table Tutorial 2. Tableau video 3. Droms, Ch 6 – Canvas	5-Market Size	250
6	10/4	Guest Speaker: Jeni Putalavage-Ross, Sprinklr Social Media Research Primary Research News Alerts Patent searching	1. Twitter for CI 2. Guide to Patent Searching 3. Patent Searching Tutorial	6-Competition pt 1	250
7	10/11	Guest Speaker: Kirk Cesari, Cesari & Reed Market Map - Magic Quadrant	1. Magic Quadrant Methodology	7-Competition pt 2	150
8	10/18	In Class Work			
9	10/25	Graduate Student Class Presentations		8-Pundit Report	300
10	11/1	Guest Speakers: Client Presentations		9-Client Interviews	50
11	11/8	Guest Speaker: Ryan Field, IC2 Institute Ethics	1. Ioia, Ch 13		
12	11/15	In Class work			
13	11/22	In Class work		Run by me, ask any questions	
14	11/29	Final Project Class Presentations Deliverable due to client Dec 5		10-Final Presentation Final Deliverable to Client	300 700