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This week's *SCIP.Online* articles:

[Scenarios, strategic early warning, and Strategic Flexibility.](#)

[Diggin' deep online to profile an executive: part 1.](#)

[Information flow in organizations.](#)

[The seven deadly sins of business war games, part 2.](#)

[The jig-saw puzzle of product development.](#)

[Finding the needle in a stack of needles.](#)

[Managing the message: communicating CI.](#)

[SCIP' s bi-annual salary survey.](#)

[CI in advertising and branding.](#)

[Ten rules for writing effective web content.](#)

[FYI: new and notable.](#)

Complimentary Article

Diggin' deep online to profile an executive: part 1.

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Albert Einstein once mused, "If we knew what we were doing, it wouldn't be called research, would it?" You have no idea, Steiny, no idea.

When it comes to profiling executives – and people in general - you've really got to pause up front and make a clear choice between the deep ocean or the big blue sky. With the Internet and a few hundred dollars in hand, there is almost no limit to what you might uncover about any individual. Start by listing what you need to know, then add in what you'd like to know, and get rid of what you do not want to know – unless you're particularly curious, or unless that is your real goal.

There is a big difference between personality profiling through primary research and profiling people through secondary research (namely online and database resources). Most importantly, a profile in either case is not a deep background check. A deep background investigation is a whole lot more than what I'm getting into in this particular column.

Most of my experiences with requests for this sort of information have revolved around profiling leaders of specific organizations for the purposes of organizational research or talent discovery and acquisition (aka headhunting). With that in mind, I've included some very popular areas of interest within traditional profiles, as well as other ideas that have come up in the past.

What you'll find below are some broad topical areas of interest followed by a set of relevant resources and possible approaches to using such resources. This series will continue with a part two in the next SCIP newsletter.

Use your best judgment when determining how far to go with a profile through secondary research. Don't get yourself into trouble, and don't waste your time on meaningless resources. Always put your client's interest first in this case, and discuss with them the information that you are after before you start digging.

What are they being paid? Are they earning more than their peers?

If your target is an officer of a public company, or serves on the board of a public company, you will be able to gather a tremendous amount of information related to compensation. While sites like www.10Kwizard.com and www.edgar-online.com make this information fairly easy to gather, they carry a cost. Thankfully, our wonderful government has made all of the information easy to find for those who know where to look within the SEC website (www.sec.gov).

Most companies will make a definitive statement about compensation within annual reports and related filings. However, others will tuck it away in an addendum, or some sort of information statement or proxy material. If you don't see what you need right away in a 10K or ARS, try looking into forms like 14A (e.g. DEF14A for executive and board compensation), S8 (includes stock to employees), or 11K (stock purchase plan details). You'll get all the detail you need regarding salary, bonus and equity (vested and unvested) plus additional detail where relevant and disclosed.

Some companies have completely focused on just this area of information. This can help quite a bit with private company research. First, find your comparables. For publicly held equivalents, try Hoover's if you want somebody else's opinion, then gather the salary data from their public counterparts (e.g. all of the CFO's at the public firms) and guesstimate. If you're interested in a shortcut to this tedious work, AON has launched a service called www.eComponline.com that will allow free access to some basic data.

Additionally, if you just need to take a guess at what your target might be earning, there are countless sites that track industry salary data. Personal favorites include www.Salary.com and the Wall Street Journal's own www.CareerJournal.com (view Salary & Hiring tab up top to browse by title, state, metro area, industry etc.).

What other boards do they serve on – if any?

Okay, this is really a whole topic unto itself, but I'm going to try to scratch the surface right here. If your target executive is not bragging about affiliations in her profile, there are other ways to get at the information. Unfortunately, it's just not as easy as 'guessing' where they'll be for other board roles, unlike guessing where they'll be within their own industry's associations. For example, Meg Whitman of eBay is on the Staples board. Guessing that she might be a part of a 'women and technology' group is a bit different.

There are a number of publications that cover the area of corporate governance, as well as countless

academic research groups. My personal favorite is from Board Member magazine (www.Boardmember.com), but their database will require that you separate from your money. I've also used traditional business school library resources to get at this information, but this is more time consuming.

However, as I mentioned, there are many watchdog groups to network through. My favorite is The Corporate Library (www.thecorporatelibrary.com). You might try calling or emailing them if you are looking at a specific person and want to track changes. Also, you might consider the network through NACD (www.nacdonline.org), the National Association of Corporate Directors. If you're looking in Europe, try the European Corporate Governance Institute (www.ecgi.org).

Personally, what I usually do is just pick up the phone, call corporate communications and ask them for the information (with a smile on my face, because they can feel that love over the phone). This does not always work, even when I really smile hard and fast.

Are they giving money to Political Parties? Did they really vote Perot?

Our wonderful government, once again, has managed to amass mountains of data on political contributions through the FEC – Federal Election Commission. A visit to their site (www.fec.gov) will yield many links, but if you want to just skip to the Transaction Query System, then type in: <http://herndon1.sdrdc.com/fecimg/query.html>. If that doesn't work, view the site map and navigate from there to search/view reports.

You'll have an option to look up individuals by name (anybody who gave over \$200 bucks technically), or you might want to view a whole Candidate or PAC summary whether or not the database contains the individual's own data. This is actually quite interesting if you're looking to understand the flavor of the corporation's own PAC for purposes such as cultural analysis.

In the latter case (viewing a Political Candidate or PAC) you might look up the target's employer by company name. From here, you will be able to see total money out, as well as links to individual contributions and related data. There is really a wealth of information on this site, and it's an interesting way to uncover new research sources within a 'human capital research' context as well (you'll see many other employee names here).

My final comment regarding these resources:

In general, many of the approaches described above will uncover information about almost anybody, regardless of corporate affiliation. There are many ethical and moral dilemmas presented with access to such information, and I urge you to think carefully about why you need this information and where you're going to put it.

As mentioned in earlier columns, please feel free to send me an email if you have some area of interest that you would appreciate seeing here..

Background

David Carpe received his BFA from the George Washington University and his MBA, with a concentration in Finance and Entrepreneurship, from Babson College. He has authored a case on Valuation for the Division Chair and has also served as a Volunteer Teacher with the National Foundation for Teaching Entrepreneurship. Professionally, he has worked in research with Fidelity, served as a Management Consultant, acted as the founder and CEO of a venture backed software company, and most recently

has been working with Clew, LLC www.clew.us serving some of the world's most formidable organizations through Clew's CI & Strategic Human Resources practice (HRCI). David, his two sons, and their dog reside in Lexington. He is a member of SCIP, MIT Enterprise Forum and IRE and has spent the majority of his career involved, somehow, with research, analysis, consulting and planning. David can be reached at contact@clew.us, 781.674.CLEW (2539). .

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