18.3. Bibliography

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18.3.2. SCIP Code of Ethics for CI Professionals

This Code of Ethics was found at the SCIP web site URL www.scip.org/ci/ethics.html at the 2000-04-29

- To continually strive to increase the recognition and respect of the profession.
- To comply with all applicable laws, domestic and international.
- To accurately disclose all relevant information, including one's identity and organisation, prior to all interviews.
- To fully respect all requests for confidentiality of information.
- To avoid conflicts of interest in fulfilling one's duties.
- To provide honest and realistic recommendations and conclusions in the execution of one's duties.
- To promote this code of ethics within one's company, with third-party contractors and within the entire profession.
- To faithfully adhere to and abide by one's company policies, objectives, and guidelines.

18.4. Glossary

A very good Glossary about Competitive Intelligence terms can be found online at the web site of Fuld & Co. At www.fuld.com/Dictionary/

18.4.1. A short Glossary about CI terms

Analysis. The process of sorting, evaluation and distilling information into Intelligence

Benchmarking. a process for comparing the own products, services, operations or work processes against other organisations which are recognised as being very efficient and best-in-class. This evaluation of the own situation is done for organisational improvement

Brainstorming. This group activity allows people to generate ideas, ask questions, propose solutions. It can be used to reach an agreement on issues concerning many individuals.

Competitive Advantage. A particular element of an organisation which gives them an advantage over its Competitors.

Competitive Intelligence Audit. A kind of inventory of internal Intelligence / Knowledge, Intelligence processes and resources. Should be done at the beginning of the design and implementation of a Competitive Intelligence process.

Competitor Profiling. An analysis comparing the past and current resources, products/services, and strategies of the Competitor. Used to capture and organise Knowledge / Intelligence concerning competing organisations.

Counter Intelligence. Counterintelligence involves anticipating what competitors may be learning about the organisation, e.g., from their publications and web site and then recommend responses to thwart their efforts.

Data. Raw, unstructured and unconnected pieces of information. This is the level before it becomes evaluated and interpreted through analysis.

Environmental Scanning. The continuous monitoring and information gathering on the business environment of the organisation. The Harvard Business School Professor Francis Aguilar coined this term in the 1960's.

External Environment. The environment the organisation is based. The country or region that affect it including culture, policy, economy, market and demographics.

Gap Analysis. Conducted to identify missing components, steps or capabilities. Used to identify to which extent the current strategies will or will not achieve results. Also used for identifying the need to adopt the strategy to a changed environment. In CI processes, the Gap Analysis can be used to determine the need for current or future resources to meet changing requirements.

Goals. Proposed long-range benefits defined in general terms.

Information. Knowledge created from a collection data.

Information Overload. There is way to much information out there.

Intelligence. After information has been filtered, distilled and analysed to a point where becomes actionable. It used to make a decision or for planning purposes.

Intelligence Briefings / Presentation. Is a presentation designed to provide accurate, impartial and "just in time" intelligence. It also points out the implications and recommendations for action, in a concise and easily assimilated form.

Intranet. An Intranet uses Internet technologies to build a private web for internal corporate use. It enables secure and low-cost access and sharing of information, supports dialogue and allows virtual workgroups to disseminate Intelligence and discuss their topics and projects.

Market Research. Research conducted with consumers and customers.

Misinformation Refers to giving "false" information to the market in order to mislead the Competition.

Mission Statement. A statement describing the type of organisation, its values and main purpose.

Objectives. Anticipated results or outcomes of a project. Described in measurable terms and a schedule during which these results shall be achieved.

Organisational Structure. Formal system of working relationships in an organisation. There are reporting relationships between different units, functions, departments and positions of the management and staff. Often represented as an Org Chart (Organisational Chart)

Patent Analysis. Approach to analyse patents to find patterns in an organisation's technology or product development strategy. This can detect the direction in which a Competitor is taking his research.

Personality Profiling. Analysis of decision makers (senior management) of the Competitor to gain understanding about their thinking. Can be used to predict the decisions they are likely to make based on their experience.

Planning. A repeating process of using Intelligence, making decisions and formulating plans for action in the future.

Primary Information Sources. Data or information gathered directly from a human source, e.g., on-site surveys, telephone interviews, win/loss analysis, ...

Process. Method to accomplish activities. Describes the integral steps that are required.

Qualitative Information. Describes information in textual or verbal form which is not based on numbers.

Quantitative Information. This describes numerical information rather than textual information

Rumour. Unverified information. best source is the industry press and the sales force. Often there is no validated sources to support it.

Scenarios. Determining a number of plausible future markets which could become dominant industry or market patterns. Technological breakthroughs (disruptive technologies) and the erosion of old market entry barrier (deregulation). By developing scenarios an organisation can extract the common features from the possible outcomes. By doing so the planning processes can consider and plan for the wildest contingencies to reduce their future decision risk.

Secondary sources. Internet, periodicals, annual reports, ... which are altered, filtered or published information. Has been processed before dissemination.

Signals. Can be used to identify the future intentions, motives and goals of a Competitor.

Soft information: Rumours, opinions, anecdotes, observations, complaints, customer feedback, ...

Stakeholder. Individuals or groups that have a direct interest or involvement in the success of an organisation. They are usually directly affected by the outcome of any decisions.

Strategy. To adopt a specific courses of action including the allocation of resources to carry out the short and long-term goals and objectives of an organisation.

Strategic Intelligence. This phrase is about intelligence which has an impcat on the long-term decisions.

Strategic Planning. Long-range planning which covers a longer period of time (e.g., three to five years). It includes setting goals, strategies and objectives.

SWOT Analysis. Is a process to analyse an organisation's internal strengths, weaknesses, opportunities and threats that exist outside the organisation or program. Can be applied to Competitors as well.

Tactical Intelligence. Describes intelligence which is used for short term decisions. Usually applied to sales and marketing objectives, e.g., information about the Competitor's advertising, pricing, product positioning, ... Can support sales and business winning activities.

Tactical Planning. Planning for the short term.

Technical Intelligence. Covers technical activities that are concerned with research, technological, patents, scientific findings and knowledge into products or services

Threats. Events or circumstances that may have an unfavourable outcome which can hinder the organisation to achieve its objectives.

18.4.2. PMBOK Project Management Glossary

The following Project Management Glossary is an excerpt from the original Project Management Body of Knowledge Glossary. It is presented to allow readers which are not familiar with the PMBOK to seek explanations of the terms used in a Project Management context.

Accountability Matrix. See responsibility assignment matrix.

Activity. An element of work performed during the course of a project. An activity normally has an expected duration, an expected cost, and expected resource requirements. Activities are often subdivided into tasks.

Activity Definition. Identifying the specific activities that must be performed in order to produce the various project deliverables.

Activity Description (AD). A short phrase or label used in a project network diagram. The activity description normally describes the scope of work of the activity.

Activity Duration Estimating. Estimating the number of work periods which will be needed to complete individual activities.

Administrative Closure. Generating, gathering, and disseminating information to formalise project completion.

Bar Chart. A graphic display of schedule-related information. In the typical bar chart, activities or other project elements are listed down the left side of the chart, dates are shown across the top, and activity duration is shown as date-placed horizontal bars. Also called a Gantt chart.

Baseline. The original plan (for a project, a work package, or an activity), plus or minus approved changes. Usually used with a modifier (e.g., cost baseline, schedule baseline, performance measurement baseline).

Baseline Finish Date. See scheduled finish date.

Baseline Start Date. See scheduled start date.

Chart of Accounts. Any numbering system used to monitor project costs by category (e.g., labour, supplies, materials). The project chart of accounts is usually based upon the corporate chart of accounts of the primary performing organisation. See also code of accounts.

Charter. See project charter.

Code of Accounts. Any numbering system used to uniquely identify each element of the work breakdown structure. See also chart of accounts.

Communications Planning. Determining the information and communications needs of the project stakeholders.

Contingency Planning. The development of a management plan that identifies alternative strategies to be used to ensure project success if specified risk events occur.

Critical Activity. Any activity on a critical path. Most commonly determined by using the critical path method. Although some activities are "critical" in the dictionary sense without being on the critical path, this meaning is seldom used in the project context.

Critical Path. In a project network diagram, the series of activities which determines the earliest completion of the project. The critical path will generally change from time to time as activities are completed ahead of or behind schedule. Although normally calculated for the entire project, the critical path can also be determined for a mile-stone or subproject. The critical path is usually defined as those activities with float less than or equal to a specified value, often zero. See critical path method.

Critical Path Method (CPM). A network analysis technique used to predict project duration by analysing which sequence of activities (which path) has the least amount of scheduling flexibility (the least amount of float). Early dates are calculated by means of a forward pass using a specified start date. Late dates are calculated by means of a backward pass starting from a specified completion date (usually the forward pass's calculated project early finish date).

Deliverable. Any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project. Often used more narrowly in reference to an external deliverable, which is a deliverable that is subject to approval by the project sponsor or customer.

Estimate. An assessment of the likely quantitative result. Usually applied to project costs and duration and should always include some indication of accuracy (e.g., ± x percent). Usually used with a modifier (e.g., preliminary, conceptual, feasibility). Some application areas have specific modifiers that imply particular accuracy ranges (e.g., order-of-magnitude estimate, budget estimate, and definitive estimate in engineering and construction projects).

Graphical Evaluation and Review Technique. A network analysis technique that allows for conditional and probabilistic treatment of logical relationships (i.e., some activities may not be performed).

Information Distribution. Making needed information available to project stakeholders in a timely manner.

Initiation. Committing the organisation to begin a project phase.

Lag. A modification of a logical relationship which directs a delay in the successor task. For ex-ample, in a finish-to-start dependency with a 10-day lag, the successor activity can-not start until 10 days after the predecessor has finished. See also lead.

Lead. A modification of a logical relationship which allows an acceleration of the successor task. For example, in a finish-to-start dependency with a 10-day lead, the successor activity can start 10 days before the predecessor has finished. See also lag.

Levelling. See resource levelling.
Logic Diagram. See project network diagram.

Management Reserve. A separately planned quantity used to allow for future situations which are impossible to predict (sometimes called "unknown unknowns"). Management reserves may involve cost or schedule. Management reserves are intended to reduce the risk of missing cost or schedule objectives. Use of management re-serve requires a change to the project's cost baseline.

Mitigation. Taking steps to lessen risk by lowering the probability of a risk event's occurrence or reducing its effect should it occur.

Monitoring. The capture, analysis, and reporting of project performance, usually as compared to plan.

Monte Carlo Analysis. A schedule risk assessment technique that performs a project simulation many times in order to calculate a distribution of likely results.

Organisational Planning. Identifying, documenting, and assigning project roles, responsibilities, and reporting relationships.

Overall Change Control. Co-ordinating changes across the entire project.

Overlap. See lead.

Pareto Diagram. A histogram, ordered by frequency of occurrence, that shows how many results were generated by each identified cause.

Performance Reporting. Collecting and disseminating information about project performance to help ensure project progress.

PERT Chart. A specific type of project network diagram. See Program Evaluation and Review Technique.

Precedence Diagramming Method (PDM). A network diagramming technique in which activities are represented by boxes (or nodes). Activities are linked by precedence relationships to show the sequence in which the activities are to be performed.

Procurement Planning. Determining what to procure and when.

Program Evaluation and Review Technique (PERT). An event-oriented network analysis technique used to estimate project duration when there is a high degree of uncertainty with the individual activity duration estimates. PERT applies the critical path method to a weighted average duration estimate. Also given as Program Evaluation and Review Technique.

Project. A temporary endeavour undertaken to create a unique product or service.

Project Charter. A document issued by senior management that provides the project manager with the authority to apply organisational resources to project activities.

Project Communications Management. A subset of project management that includes the processes required to ensure proper collection and dissemination of project information. It consists of communications planning, information distribution, performance reporting, and administrative closure.

Project Human Resource Management. A subset of project management that includes the processes required to make the most effective use of the people involved with the project. It consists of organisational planning, staff acquisition, and team development.

Project Integration Management. A subset of project management that includes the processes required to ensure that the various elements of the project are properly co-ordinated. It consists of project plan development, project plan execution, and overall change control.

Project Management (PM). The application of knowledge, skills, tools, and techniques to project activities in order to meet or exceed stakeholder needs and expectations from a project.

Project Management Body of Knowledge (PMBOK). An inclusive term that describes the sum of knowledge within the profession of project management. As with other professions such as law, medicine, and accounting, the body of knowledge rests with the practitioners and academics who apply and advance it. The PMBOK includes proven, traditional practices which are widely applied as well as innovative and advanced ones which have seen more limited use.

Project Management Software. A class of computer applications specifically designed to aid with planning and controlling project costs and schedules.

Project Management Team. The members of the project team who are directly involved in project management activities. On some smaller projects, the project management team may include virtually all of the project team members.

Project Manager (PM). The individual responsible for managing a project.

Project Network Diagram. Any schematic display of the logical relationships of project activities. Always drawn from left to right to reflect project chronology. Often incorrectly referred to as a "PERT chart."

Project Phase. A collection of logically related project activities, usually culminating in the completion of a major deliverable.

Project Plan. A formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, to facilitate communication among stakeholders, and to document approved scope, cost, and schedule baselines. A project plan may be summary or detailed.

Project Plan Development. Taking the results of other planning processes and putting them into a consistent, coherent document.

Project Plan Execution. Carrying out the project plan by performing the activities included therein.

Project Planning. The development and maintenance of the project plan.

Project Procurement Management. A subset of project management that includes the processes required to acquire goods and services from outside the performing organisation. It consists of procurement planning, solicitation planning, solicitation, source selection, contract administration, and contract close-out.

Project Quality Management. A subset of project management that includes the processes required to ensure that the project will satisfy the needs for which it was undertaken. It consists of quality planning, quality assurance, and quality control.

Project Risk Management. A subset of project management that includes the processes concerned with identifying, analysing, and responding to project risk. It consists of risk identification, risk quantification, risk response development, and risk response control.

Project Schedule. The planned dates for performing activities and the planned dates for meeting milestones.

Project Scope Management. A subset of project management that includes the processes required to ensure that the project includes all of the work required, and only the work required, to complete the project successfully. It consists of initiation, scope planning, scope definition, scope verification, and scope change control.

Project Team Members. The people who report either directly or indirectly to the project manager.

Project Time Management. A subset of project management that includes the processes required to ensure timely completion of the project. It consists of activity definition, activity sequencing, activity duration estimating, schedule development, and schedule control.

Quality Assurance (QA). (1) The process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards. (2) The organisational unit that is assigned responsibility for quality assurance.

Quality Control (QC). (1) The process of monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance. (2) The organisational unit that is assigned responsibility for quality control.

Quality Planning. Identifying which quality standards are relevant to the project and deter-mining how to satisfy them.

Reserve. A provision in the project plan to mitigate cost and/or schedule risk. Often used with a modifier (e.g., management reserve, contingency reserve) to provide further detail on what types of risk are meant to be mitigated. The specific meaning of the modified term varies by application area.

Resource Levelling. Any form of network analysis in which scheduling decisions (start and finish dates) are driven by resource management concerns (e.g., limited resource avail-ability or difficult-to-manage changes in resource levels).

Resource Planning. Determining what resources (people, equipment, materials) are needed in what quantities to perform project activities.

Responsibility Assignment Matrix (RAM). A structure which relates the project organisation structure to the work breakdown structure to help ensure that each element of the project's scope of work is assigned to a responsible individual.

Responsibility Chart. See responsibility assignment matrix.

Responsibility Matrix. See responsibility assignment matrix.

Risk Event. A discrete occurrence that may affect the project for better or worse.

Risk Identification. Determining which risk events are likely to affect the project.

Risk Quantification. Evaluating the probability of risk event occurrence and effect.

Risk Response Control. Responding to changes in risk over the course of the project.

Risk Response Development. Defining enhancement steps for opportunities and mitigation steps for threats.

Schedule. See project schedule.

Schedule Control. Controlling changes to the project schedule.

Schedule Development. Analysing activity sequences, activity duration, and resource requirements to create the project schedule.

Scope. The sum of the products and services to be provided as a project.

Scope Baseline. See baseline.

Scope Change. Any change to the project scope. A scope change almost always requires an adjustment to the project cost or schedule.

Scope Change Control. Controlling changes to project scope.

Scope Definition. Decomposing the major deliverables into smaller, more manageable components to provide better control.

Scope Planning. Developing a written scope statement that includes the project justification, the major deliverables, and the project objectives.

Scope Verification. Ensuring that all identified project deliverables have been completed satisfactorily.

Solicitation. Obtaining quotations, bids, offers, or proposals as appropriate.

Solicitation Planning. Documenting product requirements and identifying potential sources.

Source Selection. Choosing from among potential contractors.

Staff Acquisition. Getting the human resources needed assigned to and working on the project.

Stakeholder. Individuals and organisations who are involved in or may be affected by project activities.

Statement of Work (SOW). A narrative description of products or services to be supplied under contract.

Team Development. Developing individual and group skills to enhance project performance.

Team Members. See project team members.

Time-Scaled Network Diagram. Any project network diagram drawn in such a way that the positioning and length of the activity represents its duration. Essentially, it is a bar chart that includes network logic.

Work Breakdown Structure (WBS). A deliverable-oriented grouping of project elements which organises and defines the total scope of the project. Each descending level represents an increasingly detailed definition of a project component. Project components may be products or services.

Work Item. See activity.

Work Package. A deliverable at the lowest level of the work breakdown structure. A work package may be divided into activities.