



## Exploring the approaches of competitive intelligence intermediaries and information service intermediaries in soliciting key intelligence and information needs

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**ABSTRACT: Purpose.** To thrive in a dynamic business environment, organisations use competitive intelligence to gather and analyse information on rivals and stakeholders. This process involves phases like defining needs and collecting data, typically managed by intermediaries. Despite the importance of interviewing for this task, existing literature is limited, prompting this study to explore methods from competitive intelligence and information behaviour to improve the solicitation of key intelligence needs.

**Method.** The study was conducted in 2018-2024, using grounded theory (qualitative) data. The study interviewed two separate groups of intermediaries, competitive intelligence intermediaries [12] and information service intermediaries [12]. Convenience and network sampling were used. In-depth semi-structured interviews were conducted using Zoom and Microsoft Teams.

**Findings.** Both competitive intelligence and information service intermediaries use detailed questioning and proactive communication to uncover clients' needs effectively. They also emphasise the importance of understanding the client's context and goals through face-to-face interactions and iterative feedback to ensure alignment and clarity in the information retrieval process.

**Value.** This paper investigates a critical, yet under-explored phase of the competitive intelligence cycle of soliciting, articulating, expressing, and understanding key intelligence needs within the realm of competitive intelligence. Through a synthesis of in-depth qualitative interviews with competitive intelligence and information service intermediaries, coupled with an extensive review of existing literature, this study explores and sheds light on the roles, challenges, methods, and strategies employed by these intermediaries.

**KEYWORDS:** Competitive intelligence; information behaviour; intermediary; information needs; key intelligence needs

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## 1. INTRODUCTION AND RATIONAL

The ability of an organisation to survive in a forever changing business environment relies on its ability to anticipate and foresee changes that occur in the external environment (Choo, 2017; Ranjan and Foropon, 2021; Calof and Colton, 2024). Strategic decision making requires having information and understanding about rivals and other relevant business stakeholders (Du Plessis and Gulwa, 2016; Asri and Mohsin, 2020). Such knowledge and information, when acted upon promptly, can reveal competitive advantage and facilitate well-informed decision making (Choo, 2017; Singh and Hess, 2017). Therefore, in order to gain a competitive edge, organisations must constantly scan and monitor the external environment. This process leads to the usage and deployment of competitive intelligence (Singh and Hess, 2017; Hassani and Mosconi, 2021). Competitive intelligence has been explained by Rouach and Santi (2011, pp. 523) as: “an art of collecting, processing and storing information to be made available to people at all levels of the company to help shape its future and protect it against current competitive threats; it should be legal and respect code of ethics; it involves the transfer of knowledge from the environment to the organisation within established rules.”

According to Author 1 and Author 2 (2023), Dewi and Darma (2019) and Bartes (2015), the competitive intelligence process is characterised by interlinked phases, which include defining and soliciting key intelligence needs, information resource gathering, information processing and collation, analysis, reporting, and feedback and evaluation. The competitive intelligence process is carried out by competitive intelligence intermediaries, who are responsible for soliciting key intelligence needs, collecting and gathering data, analysing the data and disseminating intelligence to decision makers (Gulwa and du Plessis, 2016; Author 1 and Fourie, 2018; 2020). The competitive intelligence process is always driven by the expression of key intelligence needs of departmental leaders, stakeholders, Chief Executive Officer (CEO's), directors and decision makers (Calof and Sewdass, 2020; Bai and Li, 2020). Key intelligence needs can be described as issues of critical importance to an organisation (Du Toit, 2015). Key intelligence needs differ significantly from organisation to organisation, and if they are not defined, identified and solicited effectively, the entire competitive intelligence

process fails (Du Toit, 2015; Author 1; 2018; Tarek et al., 2019; Author 1 and Fourie, 2018; 2020).

The foundation of competitive intelligence is the solicitation of key intelligence needs; nevertheless, the competitive intelligence literature continues to underrepresent and inadequately investigate key intelligence needs and the process of soliciting them. The well-known work of Herring (1999), who created the Key Intelligence Topic process (KITs), is an exception to this notion. According to Herring, key intelligence needs are defined through interviews, categorised as strategic, tactical, or early warning needs, and then further transformed into key intelligence topics that can be used to collect data. Furthermore, Du Toit (2007) agrees with Herring (1999), by stating that the best way to solicit key intelligence needs is through interviewing approaches. Similarly, Nelke and Håkansson (2015), mention that interviews and team discussions are often used to define and solicit key intelligence needs. Murphy (2006) outlines the skills that a competitive intelligence intermediary should possess in order to efficiently identify and solicit key intelligence needs, these include good communication skills, an understanding of psychology types, interview planning and subject identification. McGonagle and Vella (2002) suggested the use of a checklist, which includes identifying the target, figuring out what information is required, prioritising the information need according to importance and urgency. It thus became evident from the consulted literature that most scholars agree that the best way to solicit key intelligence needs is through an interviewing processes, however apart from identifying this methodological approach, the actual process for soliciting key intelligence is not discussed in detail.

Due to a lack of literature from competitive intelligence focused publications on the soliciting of key intelligence needs, the study considered literature on information behaviour where the use of intermediaries has been covered. Similar to competitive intelligence intermediaries, the information behaviour literature speaks of a human information intermediary or information service intermediary, as people who assist in processing information (Jinkook and Jinsook, 2005, pp. 95). Furthermore, Mckenzie (2003, pp. 27) describes information service intermediaries as information agents or gatekeepers who interact with information sources on behalf of other people, this includes

information scientists, librarians, information broker or information office.

The justification to consider literature from information behaviour was further motivated by the corpus number of studies and conceptual papers from information science and information behaviour on how information service intermediaries identify and solicit the information needs of patrons (Choo, 2016; Cole 2018; Huvila, 2020; Savolainen, 2024; Zhang, 2024).

Key intelligence needs related to areas of intelligence, such as information on the environment, must be collected to produce intelligence on threats and opportunities that can affect an organisation (Maritz and Du Toit, 2018; Tarek et al., 2019). According to Case (2007, pp. 333), an information need on the other hand arises when an individual senses a problematic situation or information gap, in which his or her internal knowledge and beliefs and model of the environment fail to suggest a path towards the satisfaction of his or her goals. While information needs are those that reflect a person's or individual's need for information, key intelligence needs are more organisational in nature and they are fulfilled as a response to the organisation's goals, mission and vision (Author 1 and Fourie, 2018; Van den Ber et al., 2020). Du Toit (2007) goes into great detail on identifying key intelligence needs and explaining key intelligence needs. It appears from this research and the work published by Author 1 and Fourie (2018, 2020), that key intelligence needs and information needs, which are prominent in information behaviour, are strongly connected. Du Toit (2015) has tied the two concepts together, claiming that the concept of key intelligence is the same as the information needs of a business. Additionally, it was observed that participants in a study by Author 1 (2017) and Author 1 and Fourie (2018) that involved interviewing competitive intelligence intermediaries referred to the concepts of information needs and key intelligence needs interchangeably, assuming that the concepts are the same and that the only distinction is the discipline from which they originated. Furthermore, the work of Author 1 and Fourie (2020), which focused on how experiences reported on intermediary information seeking from inter-disciplinary context can inform a study on competitive intelligence intermediaries respectively, paved the way for a detailed understanding of both key intelligence needs and information needs.

Therefore, the aim of this paper is to explore the approaches applied by both competitive

intelligence intermediaries and information service intermediaries in soliciting key intelligence needs and information needs. The paper uses both the term 'key intelligence needs' associated with competitive intelligence and 'information needs' associated with information behaviour, a discipline which this paper is rooted in (Case and Given, 2016; Buchanan, et al. 2019). This paper attempts to make a contribution by explaining how key intelligence needs can be solicited by observing a similar phenomenon from an information behaviour perspective and information service intermediaries.

This paper shares findings from an exploratory study conducted between 2018–2024 by Author 1, which explored methods that could guide the soliciting of key intelligence needs. One of the research questions from this study asked: What key factors should be included in the development of an information intermediary framework for competitive intelligence intermediaries?

Based on the above-mentioned research question, this paper reports on selected findings and proposes the following research question and sub-question:

***How do competitive intelligence intermediaries and information service intermediaries compare in their approach to identifying and soliciting key intelligence needs and information need?***

RQ1: What methodologies do competitive intelligence intermediaries use to identify and solicit key intelligence needs?

RQ2: What methodologies do information service intermediaries use to identify and solicit information needs?

RQ3: How do competitive intelligence and information service intermediaries differ in their needs assessment?

The paper covers the clarification of concepts, literature review, research design and methods, findings from the interviews, a discussion of findings, recommendations and a conclusion.

## 2. CLARIFICATION OF CONCEPTS

Four terms are key to understanding how competitive intelligence intermediaries and information service intermediaries solicit key intelligence and information needs.

*Competitive intelligence:* The literature offers several definitions of competitive

intelligence, which primarily differ in focus and terminology. The recent paper by Madureira et al. (2021) that discusses the unified view and modular definition of competitive intelligence, defines competitive intelligence as “the process, and forward-looking practices used to produce knowledge on the competitive environment’s purview with the purpose of improving the organisations performance” (Madureira et al., 2021, pp. 7). Fleisher and Wright (2009) note that most definitions are similar, with only minor changes over time. Competitive intelligence is broadly understood as a process used in dynamic business environments, incorporating data on competition and the market. Definitions range from narrow, focusing solely on competition (McGonagle and Vella, 2002), to broader, including the entire external environment. It involves gathering, analysing, and utilising information to aid decision-making and strategy formulation (Pellissier and Nenzhelele, 2013). This study defines competitive intelligence as the legal and ethical collection and analysis of external information to support timely decision-making and strategic planning based on managers’ needs and expectations.

*Key intelligence needs:* Key intelligence needs are defined as the strategic and tactical requirements necessary to achieve organisational objectives (Herring, 1999; Muller, 2002). They are crucial in competitive intelligence and involve identifying relevant indicators, asking the right questions, and recognising early warning signals (Martiz and Du Toit, 2018). Du Toit (2015) describes key intelligence needs as the organisation’s information needs, emphasising their importance in information and knowledge management.

*Information needs:* Definitions of information needs vary from simple to complex, as noted by authors like Kuhlthau (2004), Ingwersen and Järvelin (2005), Case and Given (2016), and Cole (2018). Wilson (1999) describes information needs as secondary needs arising from more basic needs and suggests that barriers often arise in the quest for information. Information needs can be unexpressed, ill-defined, and ambiguous (Kuhlthau, 2004). Leckie et al. (1996) highlight that these needs are often task-related within a professional’s work context. Similarly, Ikoja-Odongo and Mostert (2006) define information needs as the recognition of uncertainty in an individual’s personal or work life.

*Intermediary:* An intermediary, as defined by Jinkook and Jinsook (2005) and Buchanan

et al. (2019), is a human or non-human entity that helps people process information, including its collection, gathering, and dissemination. Saracevic (1997) describes an intermediary as an information professional skilled in user modelling and information searching. McKenzie (2003) and Savolainen (2010) explain that intermediary information seeking involves people interacting with information sources through an agent. Author 1 and Fourie (2020), expand on this, describing intermediation as a dialogue where information flows from one person to another. This study adopts the definition of intermediary information seeking as the communication between a user seeking information and an agent with the expertise to gather, organise, and disseminate information (Author 1 and Fourie, 2020).

### 3. RELATIONSHIP BETWEEN INFORMATION BEHAVIOUR AND COMPETITIVE INTELLIGENCE

In order to understand the process of soliciting key intelligence needs using information behaviour as a perspective, the study explored the relationship between information seeking behaviour process and the competitive intelligence cycle. As a research field, information behaviour focuses on how people need, seek, and use information in their everyday lives (Huvila, 2020; Agarwal, 2022; Savolainen, 2024). Both Wilson (1999) and Case and Given (2016), writing through the lens of information behaviour, agree that the term ‘information behaviour’ is an umbrella term for all information-related activities and encounters, such as information seeking, information searching, browsing, identifying and expressing information needs, information encountering, information avoidance, and information use. Furthermore, it is well recognised that the competitive intelligence process involves information-related activities such as information searching, information storage, information manipulation, information use, and information communication, all of which fall under the information behaviour umbrella (Lundh, 2010; Wilson, 2016).

While there are similarities in information-related activities used in the two disciplines, competitive intelligence is rarely studied from an information behaviour perspective. Exceptions are Author 1 and Fourie (2018), who studied the failures of competitive intelligence from an information behaviour perspective,

<b>Wilson's (1981) information behaviour model</b>	<b>Competitive intelligence process</b>
<p><b>Information activities</b></p> <ol style="list-style-type: none"> <li>1. Sourcing user information needs</li> <li>2. Making demands of information systems and other information sources</li> <li>3. Information use</li> <li>4. Information transfer</li> </ol> <p><b>Process outcome</b></p> <ul style="list-style-type: none"> <li>• <i>Satisfaction or non-satisfaction</i></li> <li>• <i>Development of new information need</i></li> </ul>	<p><b>Information activities</b></p> <ol style="list-style-type: none"> <li>1. Determination of key intelligence needs</li> <li>2. Gathering of information resources</li> <li>3. Information processing and collation</li> <li>4. Information analysis</li> <li>5. Intelligence dissemination</li> </ol> <p><b>Process outcome</b></p> <ul style="list-style-type: none"> <li>• <i>Intelligence evaluation</i></li> <li>• <i>Development of new key intelligence need</i></li> </ul>

Figure 1. The overlap of information activities between information behaviour and competitive intelligence

along with Jin and Bouthillier (2014), who explored the information behaviour of competitive intelligence intermediaries. Both Author 1 and Fourie (2018) and Jin and Bouthillier (2008) concluded that information-related activities conducted by competitive intelligence intermediaries are closely related to those of information service intermediaries. Therefore, such information-related activities that occur in the competitive intelligence process can be studied from an information behaviour lens. To corroborate these claims, competitive intelligence scholars, including Du Toit (2015), Van den Berg et al. (2020), Ranjan and Foropon (2021), and Sufah and Subiyantoro (2023), point out that competitive intelligence depends on the ability to properly identify intelligence needs, gather information sources that can be used to address these needs, and establish the channels to secure the information and the methods of converting the information into intelligence. These aspects are highly relevant to the components of information behaviour research – information needs, information seeking and information use. Given the close relationship between these disciplines and the overlap in information-related activities, information behaviour research can provide an interesting framework to explain phenomena in competitive intelligence.

While information behaviour research presents many models that hold potential and can contribute to this paper, such as Leckie et al.'s (1996) model of information seeking professionals, Choo's (2016) process for environmental scanning, Byström and Järvelin's (1995) task complexity and information seeking user model, Dervin's (1998) sense-making framework, Ellis's (1989) information behavioural framework, and Wilson's (1981) model of information behaviour, they fall short

of explaining the relationship between competitive intelligence and information behaviour. Therefore, considering the potential relevance to the study's focus, Wilson's (1999) information behaviour model is appropriate to observe a relationship between the two disciplines, and to show how information-related activities overlap between both information behaviour and competitive intelligence, thus providing justification for studying competitive intelligence intermediary information seeking from a human information behaviour lens. While the majority of the components of Wilson's (1981) information seeking behaviour model fit in the competitive intelligence process, some information activities overlap between the two processes, as shown in Figure 1.

Through exploring Wilson's information behaviour model (1981), Figure 1 demonstrates that information-related activities in the field of information behaviour share similar characteristics with competitive intelligence. This provides justification for studying intermediary information seeking within competitive intelligence using information behaviour as a lens.

#### 4. LITERATURE REVIEW

The consulted literature on both competitive intelligence and information behaviour that could guide the study yielded discussions on the factors that should be considered for effective soliciting of key intelligence and information needs, which were categorised under (i) complexities of understanding information and key intelligence needs, (ii) difficulties of conducting the reference interview, (iii) communication proficiencies, and (iv) the importance of subject knowledge. These findings are summarised in Table 1.

Table 1. Factors impacting the effective soliciting of key intelligence and information needs

<b>Factors impacting the effective soliciting of key intelligence and information needs</b>			
<b>Factors</b>	<b>Discussion of findings</b>	<b>Authors from information behaviour</b>	<b>Authors from competitive intelligence</b>
Complexities of understandings information and key intelligence needs	Information behaviour research highlights the complexity of understanding and soliciting information needs, which can be personal, psychological, and difficult to express. In the context of competitive intelligence, challenges arise from senior managers' difficulties in clearly defining and communicating key intelligence needs, often due to subconscious or unrecognised and dormant key intelligence needs.	Taylor (1998); Wilson (2002); Nicholas and Herman (2010); Case and Given (2016); Dorner et al. (2015); Börjesson (2022)	Muller (2002); Nasri (2011); Du Toit (2015)
Difficulties of conducting the reference interview	Reference interviews, integral to both information behaviour and competitive intelligence, involve intermediaries helping decision-makers articulate their key intelligence needs through effective questioning techniques. These interviews are complex, requiring skills in communication, question negotiation, and understanding varying levels of information needs, as outlined by Taylor (1968) and others. Despite being crucial for accurate information gathering, the challenges and skills needed for successful reference interviews are not fully addressed in existing literature.	Taylor (1968); Lichstein (1990); Jennerich and Jennerich (1997); Sundin and Johannison (2005); Lundh (2010)	Strauss and Du Toit (2010); Salguero et al. (2019); Du Toit (2015)
Communication proficiencies	Effective communication is crucial in reference interviews, with challenges arising at technical, semantic, and syntactical levels, which can significantly impact the solicitation of information and key intelligence needs. Pragmatic errors, such as misinterpretations by the information professional, further complicate the process. While the literature acknowledges the importance of communication skills in competitive intelligence, there is limited specific guidance on how to address these communication challenges during the solicitation of key intelligence needs.	Taylor (1998); McKenzie (2003); Prakasan (2013)	Strauss and Du Toit (2010); Rapp and Baker (2011)
The importance of subject knowledge	Prior domain knowledge is crucial for information professionals to accurately understand and address information needs, as it enhances search effectiveness and efficiency. However, a lack of domain-specific expertise can lead to challenges in managing search complexity, selecting appropriate search terms, and interpreting subject matter, as highlighted by studies such as those by Harter and Hert (1998) and Ingwersen and Järvelin (2005). In the context of competitive intelligence, this lack of knowledge can also hinder the ability to locate "grey literature," such as confidential or non-public information, which is often essential for meeting key intelligence needs	Chen and Dhar (1991), Lou and Park (2013)	McGonagle and Vella (2002), Blenkhorn and Fleisher (2005)

Understanding and effectively soliciting information and key intelligence needs is a complex process that requires a combination of strong communication skills, effective reference interview techniques, and prior domain knowledge. While existing research highlights the challenges faced by information professionals in these areas, particularly in the context of

competitive intelligence, there remains a gap in the literature regarding specific strategies to overcome these obstacles. Addressing these gaps is crucial for enhancing the accuracy and efficiency of information gathering, especially when dealing with subconscious, unrecognised, or complex intelligence needs that are difficult to articulate.

## 5. RESEARCH METHOD

Table 2. Summary of the research design

<b>EMPIRICAL RESEARCH</b>	
Research paradigm and approach	The study followed grounded theory, using an interpretivism research paradigm. Interpretivists hold that an in-depth analysis of the issue is the only way to truly understand something. Inductive qualitative reasoning was employed.
Overall study objective	The study attempts to create a framework that explains the soliciting and articulation of key intelligence needs by taking into account the challenges and difficulties of acquiring intermediary information. By considering both the competitive intelligence and information service intermediaries, the study is cross-verifying information across the two disciplines and practices. The interviews and responses of the information service intermediaries' perspectives serve as a validating lens for the competitive intelligence findings, which not only deepen comprehension, but also offer a holistic viewpoint. The study intended to enhance the dependability of the research outcomes by using this dual-group interview approach, guaranteeing a well-supported interpretation of the data gathered.
Methods of data collection	All participants agreed to have the interviews online, choosing between Zoom and Teams.
Participants and sample group	Convenience and network sampling were used for this study. The sample included two groups: competitive intelligence intermediaries and information service intermediaries. To avoid skew data and perspectives, the study only considered competitive intelligence and information service intermediaries who reside and work for companies that were based in South Africa.
Data collection limitations	Given that every participant was affiliated with a corporate entity, it was considered morally right to request permission from the employer before beginning the interviews. Due to the sensitive nature of competitive intelligence, two potential participants were denied participation by their employers, out of fear of possibly divulging critical competitive information, also citing that it is against company policy to participate in any study. These potential participants, however, provided contact information of possible participants from their circle, which yielded a positive outcome.
Time taken to collect data	Data was collected between 10 September and 5 November 2023.
Ethical clearance	Permission to conduct the study was received from the University of Pretoria's Faculty of Engineering, Built Environment and Information Technology Committee for Research Ethics and Integrity, approval number EBIT/11/2023.
Consent	Before each interview, each employer had to grant permission to their employee, which was followed by a signed informed consent form, stating that they voluntarily agreed to participate in the study and that they granted permission for the interview to be recorded.
Confidentiality	All the participants who participated in the study were assured of confidentiality. Each participant was assigned a pseudonym to ensure that anonymity was maintained when reporting findings. Furthermore, during the interviews, some participants gave elaborate examples referring to their own organisations. To protect the identity of the organisations, they will be referred to as Company XYZ.

## 6. FINDINGS FROM THE INTERVIEWS

The grounded theory principles proposed by Charmaz (2015) were used to the data analysis. These principles included a cyclic process of transcription, initial and targeted coding, continual comparison analysis, theoretical sampling, and memo writing. Identical interview questions were asked of both groups during the study's interviews notwithstanding their separation. Eleven questions made up the interview schedule, all of which focused on the role of intermediaries in their particular context, how they conduct the soliciting of information and key intelligence needs, techniques, suggested guidelines, frameworks, and

models to help with soliciting information and key intelligence needs, potential obstacles, and solutions for those obstacles. The interview questions were comparable even though they were administered to two different groups; the only changes were the context-specific questions, which were theoretically altered to fit the population.

Figure 2 and Figure 3 show the themes, sub-themes and categories that emerged from the data relating to factors involved in soliciting information and key intelligence needs respectively. The proceeding section presents a summary of evidence and verbatim quotes of the most prominent approaches and methods to solicit information and key intelligence needs.

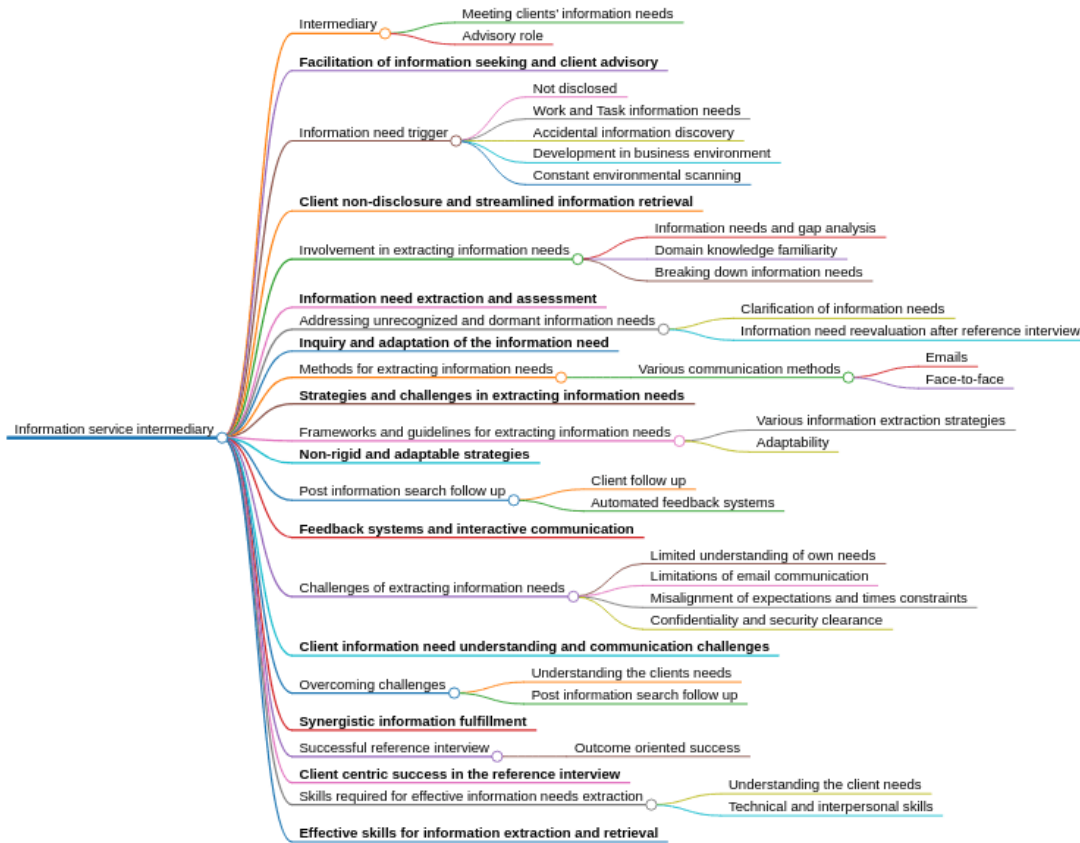


Figure 2. Factors involved in the soliciting of information needs for information service intermediaries

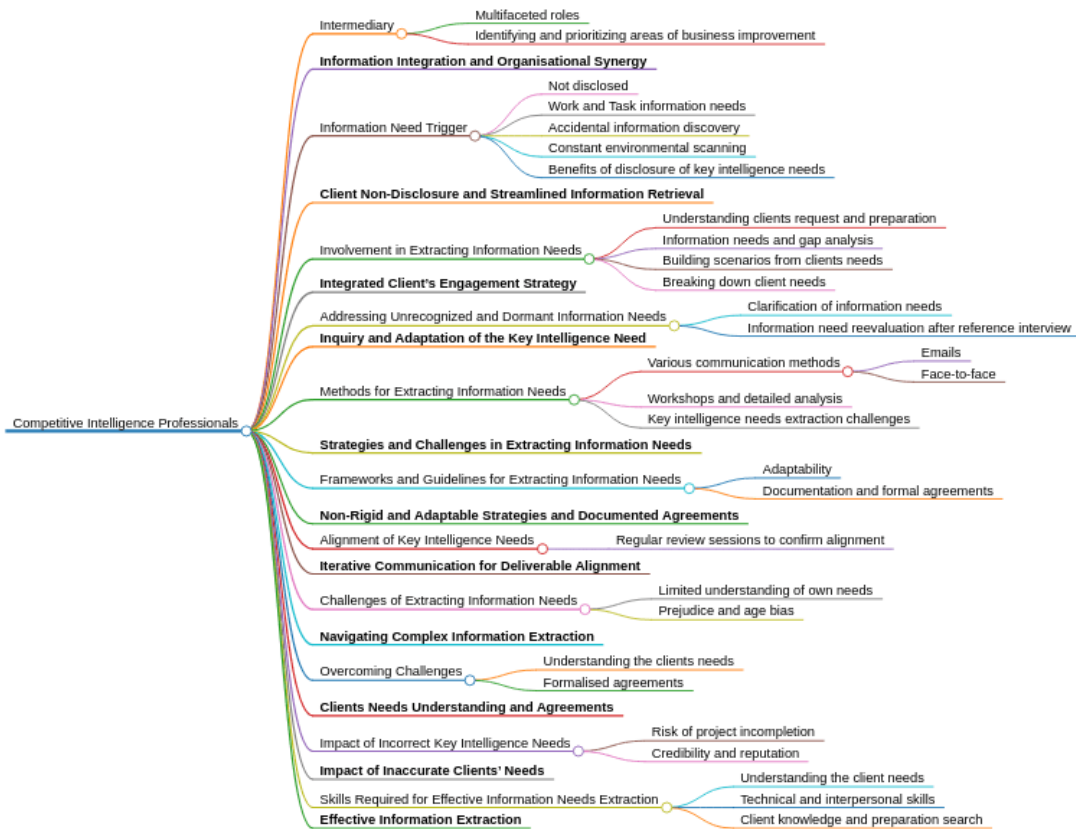


Figure 3. Factors involved in the soliciting of key intelligence needs for competitive intelligence professionals



## The role of information service and competitive intelligence intermediaries in their working context

In the interviews, all information service intermediaries emphasised that their primary role involves engaging with clients and meeting their information needs. One participant likened their role to that of a doctor assisting a patient, stating: “Just as a doctor takes an oath to help the sick, an intermediary should also provide information whenever it is needed.”

While the roles of the information service intermediaries were primarily focused on information services and information seeking, competitive intelligence intermediaries have more multifaceted responsibilities. Their tasks include identifying areas for business improvement and offering strategic advice to senior management

### *Information service intermediaries*

See Figure 4.

*The role of the intermediary is to interact with the client, I supply information to their needs as to what they need and when they need it. – William*

*...I am supplying information to their needs. – Daniel*

*If they cannot find information or they find it difficult to locate information, then they come to me. – Oscar*

### *Competitive intelligence intermediaries*

See Figure 5.

*As a competitive intelligence intermediary, you are not necessarily doing one thing or doing the same project continuously, you are not fixed*

*to one thing. For this one project, I was also in one project where I had to be responsible for the implementation of the project, collecting all the information required, developing the blueprint. – Michael*

*My role is to look at what organisations are doing with their information in terms of how they share their information, store information and utilise information, I then provide advice and methods on how they can improve their information usage. – Madison*

## The role of information and competitive intelligence intermediaries in soliciting key needs and information needs

Information service intermediaries focus on thoroughly understanding and addressing clients’ needs by clarifying requests and breaking them into specific components to enhance accuracy. Familiarity with the domain and conducting preliminary research, along with using detailed questions about unfamiliar topics, are essential practices.

In contrast, competitive intelligence intermediaries prioritise thorough preparation for client engagement. This involves researching clients’ professional and personal interests before meetings, conducting fit-gap analyses to align services with client needs, and creating scenarios to ensure a shared understanding of expectations and goals.

### *Information service intermediaries*

See Figure 6.

*Unless you work with a researcher for a long time, then you will know more or less what it is that they want, but what I do find is that before you start searching, I would first clarify what it is that they actually want. – Joseph*

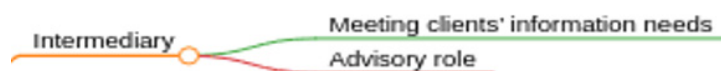


Figure 4. Information service intermediaries

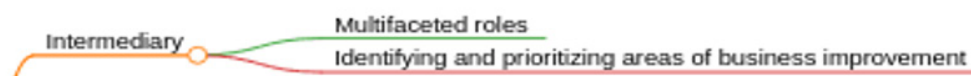


Figure 5. Competitive intelligence intermediaries



Figure 6. Information service intermediaries

...I further try to break down their information need into components. – **John**

If it is a domain that I am not familiar with, I would ask them specific questions on the domain, e.g., explain to me how a turbine engine works or explain to me that specific formula. – **William**

### **Competitive intelligence intermediaries**

See Figure 7.

Always research your clients before you go into these interviews, if you are able to prepare for a job interview, then you must also do your due diligence for these reference interviews. – **Sutton**

...What is also important is to paint scenarios, you have to paint a picture for the client, so you ensure that you are all conceptually talking about and imagining the same thing. – **Henry**

### **Addressing unrecognised and dormant needs**

Information service intermediaries mentioned that they have to address both explicit and subconscious information needs, often uncovering gaps between what clients initially seek and what they actually require. Through detailed questioning and reference interviews, information service intermediaries help clients recognise and articulate their true needs, which often evolve as discussions progress.

The competitive intelligence intermediaries emphasised the importance of thorough questioning and the use of visual tools like whiteboarding to uncover and clarify subconscious needs. This approach helps clients refine their requests and achieve a more accurate understanding of their key intelligence requirements.

### **Information service intermediaries**

See Figure 8.

Trying to understand from somebody who doesn't fully understand, that's when we engage in a reference inquiry. We get clients coming in saying that I need information about this, and when we take it a step further, trying to understand the topic they are dealing with. Once you sit down with the client to discuss more specifics about the topic, they will often start saying: "Oh, I was not aware that this is actually the information I am looking for." – **Oliver**

### **Competitive intelligence intermediaries**

See Figure 9.

I always imagine the soliciting of information needs as a search and rescue meeting, because you have to get in this meeting and rescue the information from these people's heads, because once they lock it in, they do not really open up as much as they should. – **Edward**

Making the information need visual, then clients can start saying "oh, we missed that, and we missed that." – **Henry**



Figure 7. Competitive intelligence intermediaries



Figure 8. Information service intermediaries



Figure 9. Competitive intelligence intermediaries



Figure 10. Information service intermediaries



Figure 11. Competitive intelligence intermediaries



Figure 12. Information service intermediaries

### Effective methods for soliciting needs

Information service intermediaries mentioned that they use a combination of communication methods to solicit information needs from clients, but the preferred communication method is face-to-face interaction. Participants mentioned that communication usually starts with an email, then if the information need is complex, the next form of communication will be face-to-face communication.

Similar to information service intermediaries, competitive intelligence intermediaries mentioned the importance and preferences of face-to-face meetings. Furthermore, to fully understand clients' needs, some competitive intelligence intermediaries and teams would host workshops, which would also include the client. The workshops serve as an arena to interactively discuss the information needs and the project.

#### *Information service intermediaries*

See Figure 10.

*They usually send me an email or they will call me directly on Teams. The email is usually not sufficient. Unless you have worked with the researcher for a long time, then you will have an idea of what they want. – John*

*Some clients will just give you vague description of their information needs, then you got to try and figure it out or have a quick meeting with them or ask for context, asking for keywords, that kind of thing. – Joseph*

#### *Competitive intelligence intermediaries*

See Figure 11.

*...that is one of the reasons the face-to-face conversation was so important to me*

*personally, because I think that if you can sit down and talk to someone, you're already well ahead of the competition, which is only going to do all of their work by sitting and talking to people. – Henry*

### Methods, frameworks and guidelines used to solicit needs

While there were no formal strategies, methods and frameworks given by the information service intermediaries, they outlined ways in which one can navigate and solicit the client's needs. The information service intermediaries placed emphasis on having adaptable strategies of soliciting the client's needs. Furthermore, the ability to probe for more information in response to trying to understand the clients' needs is a nuanced and strategic aspect of the reference interview and clients' needs soliciting.

Participants highlighted that the varied nature of their clients necessitates flexible approaches rather than rigid frameworks. Competitive intelligence intermediaries rely on their ability to adapt their methods to different client needs, despite the absence of formal guidelines. Instead, they use checklists to add structure to their client interactions and information solicitation.

#### *Information service intermediaries*

See Figure 12.

*There is no formal way of understanding information needs, everything that I have learned so far it was through experience. – Kinsley*

*... however, now that you ask this question, I realise that I actually have a formal*

*system that I have created in my mind, so if the information need is precise and simple, I do not probe for more information. However, if the information need is more complex, I could then ask more questions or suggest an alternative information source that could solve the problem. – Alexander*

**Competitive intelligence intermediaries**

See Figure 13.

*While there is no strategy that we follow, we use checklists. However, it is still difficult to have a set checklist since each client works differently, so whatever strategy you use has to be adaptable. When you are approaching your project, you must already know that you have to adapt to your stakeholder. – Robert*

*While we do not follow strict guidelines... – Thomas*

**Challenges in soliciting information and key intelligence needs**

Information service intermediaries expressed the struggles and complexities they encountered when clients approached them with ambiguous and ill-defined information needs. While clients grapple with uncertainty or insufficient understanding of the own information needs, the intermediaries themselves have to navigate through a fog of indistinctive objectives.

Similar to information service intermediaries, competitive intelligence intermediaries

emphasised clients’ potential lack of clarity regarding their own key intelligence needs.

**Information service intermediaries**

See Figure 14.

*Some people do not know what they are looking for, they have an idea of what they are looking for and that’s about it. – Alexander*

*The issue is also that process of having to induct them and help them understand exactly what it is that they’re trying to request from us, because these people also never know what exactly they are looking for. – Daniel*

*Fragmented information is the biggest challenge, someone telling a snippet of their information need and expecting you to figure it out can be difficult at times. – Arthur*

**Competitive intelligence intermediaries**

See Figure 15.

*They may have limited understanding of their own information need and they will use terms and describe things very differently; you have to be able to grasp what they are getting at quickly. – Edward*

*Sometimes the client does not even know that something is not within scope, they just assume that what they are looking for is possible. – Emma*



See Figure 13. Competitive intelligence intermediaries



Figure 14. Information service intermediaries



Figure 15. Competitive intelligence intermediaries

## 7. SOLUTIONS TO OVERCOME CHALLENGES IN SOLICITING INFORMATION AND KEY INTELLIGENCE NEEDS

To effectively address client information requests, competitive intelligence intermediaries first seek to clarify any ambiguities by meeting with clients to ask questions and ensure a mutual understanding of the request before conducting any searches. A key aspect of successful information solicitation is the briefing process, which benefits from having all stakeholders present from the outset to create a common understanding among all involved parties.

Understanding clients' needs serves as the cornerstone of any competitive intelligence project. One way in which information needs are solicited, negotiated and shared is through the briefing process. One of the competitive intelligence intermediaries mentioned that, for a successful briefing process to occur, all stakeholders should be present.

### *Information service intermediaries*

See Figure 16.

*When a client asks me for information or has an information request, I first make sure that I understand exactly what it is that the client is asking. If there are any ambiguities, I set a meeting with the client so that I can probe and ask questions, which enable me to better understand what it is they are looking for. Once we both reach a unified understanding, I will only do the search. – John*

### *Competitive intelligence intermediaries*

See Figure 17.

*From the project I have been telling you about, I just think we needed to create a common understanding between all the involved stakeholders. I think everyone should have been in one room from the very beginning. – George*

## 8. DISCUSSION OF FINDINGS

The study aligns closely with existing literature on the role of intermediaries in information and competitive intelligence fields. Literature defines intermediaries as individuals who search for and interact with information sources on behalf of others (Bates, 2019; Buchanan et al., 2019). This is consistent with the study's findings that intermediaries engage deeply with clients through interactions and reference interviews to meet their needs. Competitive intelligence, as noted by Herring (1999) and Carr (2003), extends beyond traditional research to include strategic support such as opportunity identification and competitor monitoring.

The study reveals that both competitive intelligence and information service intermediaries use similar methods in soliciting information. Both groups emphasise thorough needs and gap analysis before starting information searches. Information service intermediaries focus on clarifying needs, understanding the domain, and conducting detailed discussions with clients, while competitive intelligence intermediaries also recognise the challenge of clients' unarticulated needs, aligning with Wilson (2000) and Du Toit (2015) who highlight difficulties in recognising and expressing true intelligence needs.

Effective communication is crucial, with both intermediary types preferring face-to-face interactions for better understanding client needs. This reflects Lundh (2010) and Taylor (1968) who stress the importance of linguistic processes in negotiating information needs. Both types of intermediaries use flexible frameworks and checklists rather than strict guidelines to navigate client needs, as supported by McGonagle and Vella (2002).

The study identifies those clients often struggle with recognising and articulating their needs, a challenge both intermediary types face. Methods to address these challenges



Figure 16. Information service intermediaries



Figure 17. Competitive intelligence intermediaries

include clarifying ambiguities, preparing by understanding the domain, probing specifics, and following up post-information search to ensure adequacy. These practices are crucial for effectively managing and meeting client information needs.

## 9. RECOMMENDATIONS

A few recommendations are offered for further exploration:

- a. **Training and Development:** Given the identified challenges in understanding key intelligence needs, organisations should invest in training for competitive intelligence intermediaries. This training should focus on enhancing communication skills, active listening, and effective questioning techniques to better engage clients and elicit their needs.
- b. **Comparative Studies of Information Intermediaries:** Extend the research to compare competitive intelligence intermediaries with other types of information intermediaries in various sectors. Such studies could uncover common practices and unique challenges across different fields.
- c. **Client and management perspectives:** Conduct research that focuses on the clients' perspectives regarding their understanding of key intelligence needs and their experiences with intermediaries. This could help identify gaps in communication and areas for improvement in the intermediary-client relationship.

## 10. CONCLUSION

The study underlines the importance of both information service and competitive intelligence intermediaries in effectively soliciting and addressing clients' information needs. While their roles differ-competitive intelligence intermediaries often provide strategic advice, whereas information service intermediaries focus on specific information requests-both rely on thorough questioning, proactive communication, and flexible approaches.

The findings align with existing literature, which highlights key factors impacting the solicitation of key intelligence and information needs. These factors include the complexity of understanding unarticulated needs, the challenges of conducting reference

interviews, communication skills, and the significance of subject knowledge. Both types of intermediaries face difficulties when clients struggle to define their needs clearly, as noted in the works of Taylor (1968) and Du Toit (2010). The study also confirms that effective communication, particularly during face-to-face interactions, is critical for uncovering both explicit and subconscious information needs, consistent with research by Strauss and Du Toit (2010).

Additionally, the study finds that intermediaries must adapt their methods to varying client needs, as formal frameworks are often insufficient. This is supported by literature that stresses the value of domain knowledge in enhancing the accuracy of information searches and addressing complex needs (Harter and Hert, 1998; McGonagle and Vella, 2002). By integrating these insights, intermediaries can better navigate the complexities of information retrieval and ensure a more precise, actionable response to client demand.

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