

The International Connection: Developing and Maintaining a Global Expert Network

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The field of competitive intelligence (CI) has become an increasingly global industry, with CI groups establishing branch offices in major cities around the world. The use of subject-matter experts (SMEs) who can provide the specialized expertise needed to meet customer requirements is particularly important for CI practitioners working in highly specialized technical fields, where top experts and information resources may be located in another part of the world. And for CI providing early-warning intelligence, having a network of experts “on the ground” makes it possible to provide faster, more thorough coverage in real time.

But short of setting up a branch office overseas, what options are available to small- and mid-size competitive intelligence departments to set up and maintain their own global SME network? An obvious answer would be, “Just use the Internet and email.” But setting up such a network involves far more than just running the right job ad on Monster.com or contacting the right professional associations overseas.

Success depends on having the right framework of processes and tools – both for the initial phase and for ongoing operations. Undertaking this due diligence will help integrate overseas experts seamlessly into a CI group’s operations. And this integration will provide a crucial “value-added” edge for competing effectively in a global marketplace.

To set up this framework, a CI practitioner needs to answer four key questions:

1. What is my compelling need for overseas experts, and what kind of relationship do I want with them, such as full-time employee, long-term or short-term consultants?
2. What resources (e.g., books, websites, and organizations) should I use to get started?
3. How do I handle recruitment and compensation issues, including relevant regulations in an expert’s home country?
4. How do I manage my workflow and deliverables with people working in different time zones and business cultures?

In this article, we'll discuss the answers to those questions and highlight best practices that will enable you to create and manage an effective global network.

WHAT IS MY COMPELLING NEED?

The first step in creating an effective global network is to decide what role overseas experts will play in your business. There are three basic approaches:

- The transnational approach. Do you want full-time experts who will be part of a branch office you're establishing in a particular country, and who serve on your firm's regular payroll?
- The strategic alliance approach. Do you prefer to establish long-term consulting relationships with key experts in specific markets or those experts who can provide specialized capabilities?
- The ad hoc approach. Would you like to hire experts as short-term consultants for specific projects on an "as-needed" basis?

Each approach has tradeoffs. Permanent hires and long-term consultants provide greater continuity but less flexibility in staffing. Short-term consultants offer flexibility, but may not be available when you need them. Each competitive intelligence group must make its own decision as to which approach is best for a particular situation.

Foreign Subsidiaries: The Transnational Approach

If your projects tend to have a well-defined geographical focus – the telecommunications industry in India or Argentine beef exports – it might make sense to set up a branch office in the target country and staff it with local experts. This would provide better coverage of local issues as well as an "on-the-ground presence" for developing future business in that region.

Pros:

- Experts are your full-time employees and focus only on your projects.
- Experts are integrated fully into your corporate processes and systems.

Cons:

- This approach can be very expensive and beyond the reach of small and mid-size firms.
- There may be extensive regulations in the target country relating to foreign companies' establishment of branch offices and hiring local personnel. The process becomes even more complicated if the primary local language is not English.

Long-Term Consultants: The Strategic Alliance Approach

A more flexible approach is to hire long-term consultants, either individually or as part of a partnership with an overseas consultancy. This approach does not involve the large overhead of setting up and maintaining a branch office. You still gain ongoing insight for a specific geographic region, and access to world-class capabilities that may not be available at home.

Pros

- Experts focus large portions of their time on your projects, but you do not have the overhead involved with direct hires.
- There are fewer bureaucratic constraints on hiring overseas persons as consultants rather than as full-time employees.

Cons

- Experts may not be available just when you need them because of their workload for other clients.

Short-Term Consultants: The "Ad Hoc" Approach

The most flexible approach is to hire short-term consultants on an ad hoc or "as needed" basis. If you're breaking into a new market sector, or you're doing a "one-off" project related to a new target region, it makes sense to hire short-timers until you have a better sense of future business.

Pros

- Experts provide needed expertise only for specific questions or projects, giving you high flexibility on whether to establish a long-term consulting relationship.
- You have a greater field of experts to choose from, because you are only hiring expertise on the "as needed" basis.

Cons

- Experts may not be available for future projects.

SIDEBAR 1: SECONDARY RESEARCH LINKS

- **GlobalEDGE™**
<http://globaledge.msu.edu/>
- **International Business and Economics page**
<http://www2.etown.edu/vl/intlbus.html>
- **WWW Virtual Library**
<http://vlib.org>

- It may be difficult to establish short-term consulting relationships quickly if you have a project with a tight timeline in a new market sector or region of interest.

WHAT RESOURCES SHOULD I USE TO GET STARTED?

The initial resources to identify subject matter experts will vary widely depending on the need you have identified. Here's an example: A firm in the United States might find it relatively easy to hire an expert in Britain because of the common language, similar business culture, and wealth of resources available in print and online. In such a case, you might simply need to find the right industry directory, and go down the list until you find the right name.

It might be correspondingly difficult, however, to hire an expert in China because of local regulations. In addition, the specialized industry directories you need are not available – or if they are, they are not written in English.

Secondary Research (Online and Print Resources)

A good initial resource is globalEDGE,TM a knowledge portal on international business developed by the International Business Center (IBC) at Michigan State University. Here you can find country and industry profiles, trade statistics, regional news, and links to organizations and company directories. Another excellent source is the International Business and Economics page of the WWW Virtual Library, a catalogue established in 1991 by World Wide Web founder Tim Berners-Lee. (See sidebar 1, Secondary Research Links)

Organizations

Depending on your area of interest, you may be able to find an expert through academic, professional, and commercial organizations. All three types have been useful to CIPHER in staffing and expanding our global source network in a various fields.

Most academic and professional associations have membership directories. In some cases these are available to non-members. The association's membership directory can often provide a contact point for further SME research. For example, alumni networks offer a quick way to reach foreign experts. Try reaching out to your local colleges and universities. Even small schools might surprise you with their available resources, particularly if their academic programs have a strong reputation in the field of expertise you're interested in.

Because CIPHER is based near Washington, D.C., we are able to reach out easily to the numerous universities and colleges in the Washington Metro Area, and leverage the expertise of their overseas alumni. Job announcements placed through the University of Maryland, for example, drew an

SIDEBAR 2: ACADEMIC AND PROFESSIONAL ORGANIZATION LINKS

- **“Associations on the Net,” Internet Public Library (IPL)**
<http://www.ipl.org/div/aon/>
- **Google Directory page on Professional Organizations**
<http://www.google.com/Top/Society/Organizations/Professional/>
- **International Directory of Professional Associations (IDPA)**
<http://www.associationsdirectory.org/>

international response and resulted in our hiring a foreign consultant who had graduated from a master's program at their College of Information Science. We can also draw on the international alumni resources of the Johns Hopkins University, a school that also has a Certificate in Competitive Intelligence program.

The following sites are useful basic resources for contacting academic and professional organizations, whether by industry or geography: Associations on the net (Internet Public Library), Google directory page on professional organizations, and International directory of professional associations. These all have heavy emphasis on English-speaking countries. (See sidebar 2. Academic and Professional Organization Links)

Business/Commercial Organizations

The Chambers of Commerce are among the best initial contacts – not only because of the resources they provide themselves, but because they can put you in touch with similar organizations overseas. The United States Chamber of Commerce offers resources on international trade. The International Chamber of CommerceTM has affiliate organizations in over 100 countries; the U.S. affiliate is the United States Council for International Business (USCIB).

You can also contact bilateral business associations which focus on commercial relationships between two specific countries or regions. Examples are the British-American Business Council and the United States of America-China Chamber of Commerce. Many U.S. states provide local directories for such organizations.

Another alternative is to contact international trade associations. The Federation of International Trade Associations (FITA) fosters international trade by strengthening the role of local, regional, and national associations throughout the United States, Mexico, and Canada that have an international mission. The federation's affiliates include 450+ independent international associations among the 400,000 organizations linked to FITA via a FITA

SIDEBAR 3: BUSINESS AND COMMERCIAL ORGANIZATION LINKS

- **Google**
http://www.google.com/Top/Business/International_Business_and_Trade/Associations/
- **International Chamber of Commerce**
<http://www.iccwbo.org/>
- **United States Council for International Business**
<http://www.uscib.org/>
- **United States Chamber of Commerce**
<http://www.uschamber.com/issues/index/international/default>
- **Federation of International Trade Associations**
<http://fita.org>
- **The Directory of Associations**
<http://www.marketingsource.com/associations/>
- **Bi-national Chambers of Commerce**
http://www.business.com/directory/government_and_trade/organizations/chambers_of_commerce/binational/
- **Association of Bi-National Chambers of Commerce in Florida**
<http://www.abicc.org/>
- **World Chambers Network**
<http://www.worldchambers.com/>
- **British-American Business Council**
<http://www.babc.org/>
- **United States of America-China Chamber of Commerce**
<http://www.usccc.org/>
- **Sister Cities International (U.S. focus)**
<http://www.sister-cities.org/>
- **Town twinning information (Europe focus)** http://ec.europa.eu/citizenship/action1/measure1_en.html
- **Town twinning information (UK focus)**
http://www.twinning.org.uk/uk_twinning.htm

member association. The FITA website provides access to numerous directories, including ones that are industry-specific, country-specific, and ones which provide bi-national and multi-national resources.

Contacting a local city that has an overseas “sister city” or “town twinning” relationship in your region of interest might be another way to start the search; the non-profit network Sisters Cities International is a key member of coordinating relationships for U.S. cities. A general listing of

organizations related to international business and trade can be found in the Google Directory. (See Sidebar 3, Business and Commercial Organization Links)

Expert Lists

Another potential source is an expert database. These databases are often used by the legal profession to find expert witnesses, but can also help identify potential experts for CI projects. While many of these sources are U.S.-centric, a few take a global approach and allow you to search for experts by region/country and subject-matter specialty.

ISI Highly Cited Researchers, is owned by Thomson Scientific and is an expert gateway to the most highly influential scientists and scholars worldwide. Experts are searchable by expertise category, geography, name or institution. Each researcher is selected based on the total number of citations received by that individual within a given category, as recorded in the ISI database. The researcher record is very detailed; providing contact information as well as education, affiliations, honors and awards, grants, research interests and publications.

COS Expertise is a database of first-person profiles of researchers at leading universities and other institutions involved in basic or applied research. COS Expertise contains nearly 480,000 profiles submitted by researchers, scholars and other experts from more than 1,300 universities, government agencies, and other R&D organizations from around the world. A skilled team of editors reviews each new profile and any updates to existing profiles; to insure the data's relevance, consistency and accuracy, and to optimize the record for searching. (See Sidebar 4: Expert list links.)

HOW DO I HANDLE RECRUITMENT AND COMPENSATION ISSUES?

If you are recruiting through a professional organization or alumni network, the process can be relatively straightforward because you are already targeting the right population. Things can be more difficult if you are advertising via an electronic job-board. However, popular job-search sites such as International.Monster.com specialize in recruiting overseas workers and can help you identify potential hires by job specialty and geographical location.

“Globalizing” the Job Announcement

In preparing the job announcement, remember to write it for a worldwide audience. Avoid Americanisms such as jargon, cultural references, and potentially even spellings which might not be familiar to persons from other countries. You might consider consulting a British-style dictionary if you are trying to reach experts from the United Kingdom or other countries where British-style English predominates.

SIDEBAR 4: EXPERT LIST LINKS

- **ISI Highly Cited Researchers**
<http://isihighlycited.com/>
- **ISI Highly Cited Researchers**
<http://isihighlycited.com/>
- **COS Expertise**
<http://expertise.cos.com/>
- **IRS International Taxpayer**
<http://www.irs.gov/businesses/small/international/index.html>

Handling the Initial Response

Cultural sensitivity is critical at this stage, especially in responding to candidates from non-Western cultures. For starters, names which are typical to a certain gender in one culture, may be completely unfamiliar to another. For example, the authors of this article – Eric and Kathy – have first names which in Western culture are recognizably gender-specific. These distinctions might not be as obvious, however, to someone from a non-Western culture.

A related challenge might be to know how to distinguish a family name from a given name. If you're "cold-calling" a potential hire from Asia, know that the convention is to place the family name first. However, sometimes Asians who have studied or worked in the West will use the Western naming convention and place their given name first.

If the potential candidates are well-known in their field, you may be able to find profiles or publications that give more information. In cases where no context is available, try simply cutting and pasting the person's entire name into your initial contact letter. Then ask as delicately as possible, "What would

be the best way to address you?" On a similar note, you can make sure your own gender is clear by simply adding "Mr." or "Ms." as appropriate into your own signature.

Conducting a Background Check

Language barriers and widely-separated time zones make it difficult to conduct a traditional background check. For example, it can be difficult to speak by phone with a person's references if their work day does not coincide with yours. Also, you may find that a person's references may speak only the local language. If you'd prefer not to handle this yourself, several companies such as Kroll specialize in conducting international background checks.

Setting the Terms of Engagement

All contractual documents should be straightforward, spelling out each party's responsibilities and expectations in clear fashion. Any terms which might be unclear to a non-native speaker of English – or to a person who uses another variety of English – should be clarified before the parties sign.

Tax Forms and Related Paperwork

To pay non-resident aliens, you must fill out all the appropriate forms with the U.S. Internal Revenue Service. Information on the "International Taxpayer" is available from the IRS website. Depending on how you choose to structure your global network, you may also be liable for local taxes in your overseas experts' home countries.

Compensation

To attract the right global workforce, you must be willing to pay what the global market will bear. Online services such as Salary.com can provide some context, as can organizations such as the Chambers of Commerce mentioned earlier.

SIDEBAR 5: DEFINING YOUR TERMS: AN ANECDOTE

As the early 20th-century Irish playwright George Bernard Shaw once noted, "England and America are two countries separated by a common language."

My own experience of being separated by a common language was at a corporate communications seminar several years ago in Washington, D.C. In addition to the United States, other attendees were expatriates from India, South Africa, and several South American countries, who worked in D.C. for various global companies or international organizations.

At one point, when we were discussing whether "to table" a topic, we had to sort out whether we meant: (a) we want to *put it on* the table for discussion, as in American English; or (b) *take it off* the table and out of the discussion, as in British English.

See also the entry "Who speaks Global English?" (June 15, 2007), from the "Separated by a Common Language" blog of M. Lynne Murphy, an American linguist who teaches at the University of Sussex, Great Britain. <http://separatedbyacommonlanguage.blogspot.com/>

SIDEBAR 6: RESOURCES FOR INTERNATIONAL BUSINESS ETIQUETTE

- **The “International Business Etiquette”** book series by Ann Marie Sabath, founder of At Ease Inc., a U.S.-based firm that provides resources and training for business protocol. <http://www.annmariesabath.com/>
- **The International Business Etiquette Internet Sourcebook.** March 2007. Agriculture and Agri-Food Canada (Canada’s agricultural agency). Viewed 9 July 2007. http://atn-riae.agr.ca/export/4027_e.htm
- **Intercultural Etiquette Articles.** Kwintessential, a UK-based firm that provides services in intercultural communication, cross-cultural training, translation, and interpretation. <http://www.kwintessential.co.uk/cultural-services/articles-etiquette.html>
- **ExecutivePlanet.com** <http://www.executiveplanet.com/>
- **WorldBiz.com** <http://www.worldbiz.com/>

You should also keep in mind the differences between local labor markets. Depending on the industry and the skill set, what might be considered a great hourly rate in Singapore might be thought overpriced in Rio de Janeiro, or vice versa.

HOW DO I MANAGE MY WORKFLOW AND DELIVERABLES?

It may seem obvious, but the success of long-distance “virtual teaming” depends on setting and communicating clear expectations. On projects where overseas consultants are core members of the project team, we make sure to spell out all issues up front, including the exact roles and responsibilities of each team member and the exact specifications for each deliverable.

The differences in time zones alone make it hard for the project manager to respond if a serious misunderstanding develops. Clear expectations and a well-defined feedback mechanism also make it easier to respond to specific concerns.

Feedback Mechanisms

Business etiquette varies by country, and always keep those differences in mind when you’re providing feedback. What an expert from one culture perceives as constructive

criticism may be perceived more negatively by an expert from another part of the world. Larger corporations have groups which train international staff on appropriate business behavior. For small and mid-size companies, a good international business etiquette book can serve the same purpose. (See sidebar 6: Resources for International Business Etiquettes.)

When an expert’s time zone and standard workday correspond well with CIPHER’s, we are able to communicate both by email and telephone. Phone contact conveys an extra layer of meaning that is difficult to express with email alone, and it helps to prevent misunderstandings.

Another project feedback mechanism is holding periodic mid-project meetings to make sure the virtual team is still on target and the project is flowing smoothly. Periodic meetings also help to create a team spirit and allow for project course corrections to be made before they become potential problems. CIPHER used this technique when the project involved five geographically-dispersed researchers working on different aspects of the same problem. The weekly project meetings were extremely useful for the team from a coordination standpoint. The regular contact provided a mechanism for each team member to tap into the expertise of the other researchers when faced with a particularly difficult research request.

Deliverables

The 24-hour global business day creates the opportunity for an unending production cycle: you can have consultants in India and Japan working on a project while those in Western Europe and North America are sleeping, and vice versa. To manage this workflow effectively, you need a good project-management system, with clear schedules for deliverables.

You might even consider setting up a bank of clocks to show the local time in each region where your source network is operating. It seems pretty basic to clearly state timelines in both the time zone of the SME and the time zone of the CI practitioner. Yet it’s extremely easy to miscommunicate in this critical area when dealing with staff in other parts of the world.

Localization of Content

Be sure to establish clear formatting standards for deliverables, in terms of syntax, usage, spelling, and punctuation. An automotive customer in Detroit, for example, who wants a report on British car designs, would not want a document that talks about a car’s “boot” and “number plate” instead of the trunk and the license plate.

It’s also critical to specify the desired standard of measurement: whether it’s the metric system, American-style measurements, or some other standard.

Good translation of non-English information can be a particularly important aspect of global projects. If you do not have native language speaking staff to translate, a good starting place to understand how to select a translation service is an article, "Finding the Best Translation Service" from VerbumSoft. This company provides an online database of translators from around the world. Technical or scientific translation services are more difficult to identify, however, due to the specialized scientific language skills needed.

CONCLUSION

It is risky for competitive intelligence practitioners to build a global expert network, but it's even riskier not to. As Thomas L. Friedman and other writers on globalization have noted, the world has become "flattened"—making expertise in any part of the world available to every other part. CI groups in North America must now compete with their counterparts in Asia, Africa, South America...and everywhere else.

This article focused on facing the unique challenges and barriers to establishing a global subject matter expert network. There are not only obvious issues such as cultural barriers, but also structural issues such as the type of network to set up, and how to pay and manage the experts you hire.

Remember that in some respects hiring a foreign expert is no different from hiring a local one: you need to conduct your due diligence to make sure that you've found the right candidate who will bring the right capabilities, work ethic, and production cycle. Remember, too there's always the option of hiring a firm who already has a ready-network on tap. While this doesn't cut out all the legwork we've discussed, it does provide you with a reputable and flexible solution.

Either way, conducting this due diligence greatly increases the odds that your experts will provide you with the seamless web of global world-class expertise that your customers require.

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