

Interview with Jim O'Brien – Regence

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Jim's Biography

Jim O'Brien is a competitive intelligence practitioner with experience in the financial services industry and the insurance arena. He currently manages the CI function for the Regence Group, an insurance provider in Idaho, Oregon, Utah, and Washington. Prior, O'Brien worked as a CI analyst for JPMorgan Chase & Co. in their Treasury Services division. He received a B.S. in Commerce, with a concentration in International Business, from the University of Virginia. O'Brien hails from the New York City area, where he lived prior to moving to Portland, Oregon, 3 years ago.

Interviewers: Sean Campbell and Scott Swigart of [Cascade Insights](#)

Interview Topics

- [What it takes to be a good Competitive Intelligence practitioner](#)
- [The two fundamental types of CI people, and why you need both](#)
- [How people happen into the CI field, and why there's no conventional training for it](#)
- [How CI practice fits into various industries](#)

Sean Campbell: James, please give us a little bit of your background in relation to competitive intelligence.

James Regence: Sure. I got my start in CI back in 2004 at JP Morgan. I just kind of landed in the field by accident; from what I am told, that happens to a lot of people, although there are common skills that attune you to it. You need to be pretty good with both words and numbers, be able to articulate yourself in written and verbal form, and also able to demonstrate the financial value of your analysis.

I enjoyed working with CI, so I stuck with it when I left JP Morgan, and I landed in healthcare. It seems that CI practice is a transferable skill set, such that hiring managers from different industries are willing to take someone who doesn't know much about the industry but does have that CI skill set.

Sean: What do you think are the core elements of that skill set?

James: The first requirement is to have some background in finance and to feel comfortable enough with numbers to do basic financial analysis. At the same time, you need to enjoy reading and writing, so you have the patience and ability to comb through large quantities of information.

That kind of segues to a third important requirement: a thirst for knowledge. Good CI people really have to love to ask why and to dig and dig and dig, even if it might make them annoying in social situations.

[laughter]

Sean: Right—drawing out someone's views on Heisenberg's Uncertainty Principle while they're trying to enjoy their latte.

James: I find myself going into CI mode sometimes, like when I meet a friend of a friend in a bar and I wind up grilling them: "OK, so where do you work? What do you do? How did you end up there?"

[laughter]

Sean: I heard recently about a guy describing a similar impulse while sitting at a stop light and looking at a billboard while in CI mode. His thought process was, "Where does that content come from? Why did they choose that image? Why did they choose that marketing message?"



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One key challenge—or requirement, if you like—is to be able to filter through immense amounts of information, separating the noise from the signal.

James: The Internet makes everything available at your fingertips, and from that glut of information, it's a matter of whittling it down to the core essential pieces.

I don't think I have ever encountered a request for information that I couldn't find something on. It's just a matter of having the tenacity and the patience to keep searching; it may be as simple as just doing Google searches for hours and going through every result you can find, one by one by one.

Sean: I think that finding the right path through heaps of information is sort of a weird abstract ninja Google affinity that can't necessarily be taught. It's very non-linear and intuitive.

Some people just seem to have it and others don't, in a similar way to how some people can do public speaking to an A+ level but most people can't, even of they build their skills through training and practice.

James: I have been asked by companies to research people they are considering hiring for very senior positions, competitors, or CEOs from other companies in preparation for meeting with them.

There are many, many examples of finding one small bit of information that most people wouldn't know what to do with, but it sparks a whole new line of inquiry. You might find out that their child's name is Sarah. Once you know there is a child, you can start searching elementary schools and go from there. You might hear by word of mouth that they went through a divorce, and so you know there are public records out there.

Sean: My wife mentioned to me that she wanted to find a friend from college that she hadn't seen in 15 years. The only piece of data that she had is that she thought she was a pastor at a church somewhere in California that might be Methodist or it might not be. Within a couple of minutes sitting on the couch at 10 at night, I had the person's email address.

My wife looked over at me and said, "How did you do that? I don't get that! I had no idea you could get that that fast!" I tried to explain to her how I got it, but it's like you are saying—it's not a linear progression.

James: You're right. Also, you can't teach that curiosity and, as you are alluding to, that ability to take all these little bits of information and create the final product—the amalgamation.

It is really scattered and you have to be comfortable in that realm of uncertainty. It's not like accounting, for example. If you are going to do an audit there's step A, step B, step C, and step D. Practicing CI means that you have to figure out the order as you go: it might be D, C, A, B, X, Y, Z.

[laughter]

You've got to feel comfortable as a CI practitioner with knowing that you're going to get things thrown at you where whoever is directing you to do something can't tell you exactly what it is. You've got to figure out how to do it on the fly and use ingenuity. And as you said, it's not really something you can teach.

Scott Swigart: Discerning evidence is a big requirement, as well. For example, there's no way that a competitor can do something really major without leaving any tracks whatsoever, even if those tracks are very obscure. It's as if you see just the corner of a piece of paper sticking out from under the sand, and once you know what to look for, the information becomes pretty easy to find.

Maybe buried in some interview, you come across a product codename that you hadn't seen in three hours of searching. You Google that codename plus the company name, and all of a sudden, you come across a wealth of information, because you finally know what to search for.

I think that's what makes it fun—that sense of exhilaration when you come across the treasure chest.

James: I think there are two kinds of CI people, and they sometimes really clash, yet they produce really good work when they're on the same team, if they can learn to get along.

You have the people who just really like to close their office door and go through all of the information publicly available. They're really good, because

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they will just keep searching, and searching, and searching. They have that workhorse attitude.

The other type is the person who is willing to take a leap of faith based on their own analysis. You can't really source those kinds of insights.

If one person could somehow possess both of those core skills, you could have a one person team. But in my experience, those Type A people who are really the researchers gather all the info, and they kind of hand it off to the other type of person who is less inclined to find interest in mundane, repetitive tasks. That second group will take the information and combine it with other strands to create an intuitive leap of faith that finishes the process toward the overall goal.

Sean: I've sensed that at the national SCIP conference, or just even as we've been forming this chapter. You get the sense that some people focus on the analytics, and there's another type of person that is more involved with human factors and the intuitive aspects.

Neither of those two approaches is complete on its own; to make a really professional team, you need a little bit of both, and there needs to be a little bit of friction between the two of them so they eventually tease out something in the middle.

James: To that point, I know that I tend to be a bit more intuitive in my style of work. If I'm looking for someone who ideally would complement me well, it might be that person that is much more organized and much more willing to make sure that everything has a parenthetical citation.

[laughter]

Sean: It's funny—I saw an interesting study the other day. It's a slight departure from our conversation thread, but there's a trend in business to quit trying to make employees work on their weaknesses and send them to training because they don't do spreadsheets or fill in forms well. Instead, this trend is to tell them just to work on their strengths.

The idea is that people are more effective and happier if they are focused on their strengths instead of their weaknesses—go figure.

The flipside is that you need to build teams that work together, so you have a lot less ability just to take one type A person, point them in a direction, and say, solve all challenges before you; it won't really work that way in a team.

I think they're getting at something, even though no truth applied universally works out. There will of course be organizations that it wouldn't work for, but it is still interesting.

To go back to something from earlier in the conversation, though, you mentioned that you sort of backed into CI. We hear that over and over, actually, and I'm curious as to why that might be. Does that mesh with what you've seen?

On a related note, it doesn't seem like people really leave all that often—they kind of back into it, and then they really, really like it for a long period of time.

James: It's a small niche, so it's not the type of thing that's large enough for a university program. It kind of makes sense that there isn't going to be an entry-level training program for CI practitioners.

But beyond that, I think it is for people that have a few years' experience in the work world, if not much more than that, because it is about seeing patterns and intuition and whatnot.

What happens with a lot of people is that they find out about a group in their company that does research on competitors, and the CI type of person is immediately drawn to that group. In my case, a friend that knew me very well heard of an opening in this group and knew that they were all about getting dirt on the competition.

She immediately saw the fit with my personality and said, "That's totally Jim."

[laughter]

James: I think that CI people, once they discover that there is such a department in their organization, often gravitate there and don't want to leave. Then they broaden their horizons through SCIP and through networks of colleagues, and they realize that this type of group exists in most industries, and it can actually be a career. It's a great discovery, but it's not something

that I knew I would end up in by any means.

Scott: It seems like there are some people who are wired to do sales, there's some people who just were born to write code and do programming, and certain affinities to all sorts of job roles.

I think the difference is that with CI, a lot of people don't even realize the profession exists. We all recognize that people do marketing, or they do HR, or they do management, or they do project management, and I think there are a lot of people out there who have the interest and aptitude for CI, but they don't even know that it's an available position.

James: That is kind of a cool thing in a sense. CI is the kind of a group that might get cut during economic contractions, for example, but usually, CI people can find work at another organization. They tend to be very malleable, and that analytical skill set tends to be highly transferable.

But getting to your main point, it's true that there are a lot of people who really don't know what it is, and you encounter that every day when you're in a larger organization. Just meeting with colleagues, I constantly have to explain what the heck competitive intelligence is.

[laughter]

James: They immediately start equating it to the CIA, or they just come up with all sorts of interpretations that are, 90 percent of the time, incorrect.

Scott: You can be at the playground with your kid's preschool, and somebody says, "What do you do for a living?" After you explain it to them, they kind of give you a look like, "So, I shouldn't really be talking to you."

[laughter]

James: Sometimes I find that if you just want to throw it out there, it sounds pretty cool at parties. It leaves that aura of mystique, but if you just want to expedite the conversation, the simplest way is to say, "I do market research on competitors."

It's a pretty simple way to explain it, at least as far as what I do, and it doesn't sound as sexy as competitive intelligence. You could even just say "market research," and usually people don't ask a question beyond that, because it sounds sufficiently boring.

[laughter]

Sean: In a different area, what do you think about CI as it relates specifically to the healthcare industry more broadly? What are some observations you've made over the years, that you think readers of the blog and people who participate in the local chapter will find of interest?

James: I get the impression that the competitive intelligence functions at the for profit healthcare companies are much more aggressive, whereas my employer is a not for profit. The only basis of comparison that I have is the investment bank I used to work for, where anything went. I never even heard the word "ethics" discussed.

It's not that the people were unethical, but they were just very driven to get information, whereas here, we're constantly stopped by managers or senior managers and asked, "Should I be reading this? How'd you get this information?" I think it's just part of the culture of the not for profit that I work at, where we have two departments dedicated to ethics and compliance and privacy.

There's a publication by SCIP, the "Ethical Gray Zone" that discusses situations that aren't black or white. I find that pretty much anything that approaches just a tinge of gray, here I'm told to put it down and not to use it.

In contrast, I was encouraged to take deep dives into the gray zone when I worked for an investment bank

I would like to see us get more aggressive, but of course healthcare is very tightly regulated. And with the government getting more and more involved, to be honest, I'm not sure that CI is going to exist down the road in healthcare.

If we move toward a single payer type of system, then the products become more streamlined, similar to Medicare and Medicaid, where you have your basic products and there isn't much differentiation, besides price and network. There isn't much of a variation.

Sean: It would be like doing CI on a regulated airline industry.

At some point, if everybody's offering the same dental plan, the same healthcare plan, the same deductibles, and the same copays, and you have minor variances in like whether Doctor A versus Doctor B has opted to be in the network, you'd be at a point then where it would be more difficult to justify CI. But, like you said earlier, then there is the opportunity to transition into a different field or whatever.

James: It's very regulated, and everything in theory needs to be put out there for approval. The various departments of insurance and the insurance commissioners have to approve rates and product filings. In theory, everything should be out there, which would perhaps make CI less germane to a healthcare organization.

Actually, though, it just makes it more challenging, because you'll find that it's often what companies do not say in their filings, or it's the fine print buried in a 400 page contract. Somewhere in those 400 pages will be crucial information that contains the limitations and exclusions.

Scott: In that case, there's still an opportunity for competitive intelligence, which may be reading the fine print, or it might be knowing what somebody else is going to do before they announce it, because they leave a trail.

James: And as I alluded to, it's often what's not included in public disclosures that is the most telling, and figuring that out is sometimes nearly impossible, so that could be an instance where you need to tap into your networks.

Your human networks of intelligence may include colleagues in the industry or friends at different companies,

Insurers need to differentiate their products, but at the same time, they need to cut costs. It's a very convoluted and complicated industry. If you can become a subject matter expert— and I don't claim to be one, by the way— then you're kind of in a class of your own.

Even our 535 members of Congress can't figure out the healthcare system. Those people that really understand the system and can read between the lines to understand the inner-workings of various insurers are rare—that combination of CI knowledge and healthcare knowledge is valuable.

Scott: Well, that's a great place to wrap up. Thanks, James.

James: Thank you.

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One Response to "Interview with Jim O'Brien – Regence"



[Dennis Muscato](#) says:

[September 22, 2008 at 8:52 pm](#)

Thank you for a wonderful interview. As I was reading I jotted down a few keywords that caught my attention.

Non-Linear

From a computer science aspect, it reminds me of an application I once worked on where one part of the code modified the instructions it would do later. That application would never run twice the same way because what it did depended on the input transactions you gave it.

Searching for information is similar, the search strategy I would construct initially would be changed as I went along. Discovering and learning information that would affect my search strategy itself. I would be considering ways to search I hadn't thought about before.

From a math aspect in finding solutions to non-linear problems, goal seeking comes to mind. Finding the overall best solutions depended on where one started the search

Imagine an area where there are 3 hills, A, B, and C with A being the largest hill. Imagine a blind person parachuting down seeking the tallest hill A. Depending on where they landed and began their walk, they would encounter A, B, or C. The only way to insure you find the highest peak is to keep parachuting down in different random places and begin the walk.

In the same way in searching, we often need to start with entirely new starting points and strategies to reach the best overall search result.

Teamwork

I totally agree with the team effort concept. It is about asking the right questions, analyzing, delivering information, gaining feedback from practioners and the audience being served.

Ethics

Where I worked in Information Technology and Corporate Responsibility, the importance of being ethical was paramount. Avoid the grey zone.

I look forward to more interviews, experiences, and viewpoints!

- Dennis

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