



ARTICLE



THE COMPETITIVE INTELLIGENCE IMPLEMENTATION PROCESS IN A SERVICE ORGANIZATION

O PROCESSO DE IMPLEMENTAÇÃO DA INTELIGÊNCIA COMPETITIVA EM UMA ORGANIZAÇÃO DE SERVIÇOS

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ABSTRACT

Purpose: The general objective of this research is to present the process of implementing Competitive Intelligence in a small service organization.

Methodology/approach: A descriptive qualitative study was carried out using the Action Research strategy. Different collection techniques (semi-structured interviews, observation, word evocation) and data analysis (content analysis, thematic analysis, benchmarking) were used for each stage of the action research framework.

Originality/Relevance: The practical relevance of this research lies in the contribution it makes by presenting in detail the process of implementing CI in the organization studied, indicating possible techniques and tools to be used in the context of small organizations for the effective use of CI.

Key findings: The main findings show the effective possibility of using the CI process in a small service organization, and also infer the main differences from its direct competitors, as well as challenging the points of need for maintaining competitive capacity in the company studied.

Theoretical/methodological contributions: In theoretical terms, the study advances the gap in the literature by bringing the CI process into applied terms. In addition, this study also contributes by discussing CI as a process that enables evolution in organizational management, and also promotes market knowledge, strategy development and anticipation of future trends, especially for small service organizations. In methodological terms, the use of action research as a strategy in the field of study contributes to the verification of theory and practice, the content of which can serve as a basis for future studies.

Keywords: Competitive Intelligence; Service companies; Small companies; Action-research.



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RESUMO

Objetivo: O objetivo geral desta pesquisa é apresentar o processo de implementação da Inteligência Competitiva em uma pequena organização de serviços.

Metodologia/abordagem: Foi desenvolvida uma pesquisa qualitativa descritiva utilizando a estratégia de Pesquisa-Ação. Para cada etapa do framework da pesquisa ação foram utilizadas técnicas de coleta (entrevista semiestruturadas, observação, evocação de palavras) e análise de dados (análise de conteúdo, análise temática, benchmarking) distintas.

Originalidade/Relevância: A relevância prática desta pesquisa reside na contribuição que traz ao apresentar detalhadamente o processo de implementação da IC na organização estudada, o que pode contribuir para nortear o uso do mesmo processo em outras pequenas organizações, ao mesmo tempo que as particularidades dessas organizações são consideradas.

Principais conclusões: Os principais achados evidenciam a possibilidade efetiva de uso do processo de IC em uma organização de serviços de pequeno porte, e ainda inferir sobre as principais diferenças diante seus concorrentes diretos, assim como, contestar os pontos de necessidades para manutenção da capacidade competitiva na empresa estudada.

Contribuições teóricas/metodológicas: Em termos teóricos, o estudo avança na lacuna da literatura ao trazer em termos aplicados o processo da IC. Além disso, este estudo também contribui ao discutir a IC como um processo que possibilita evolução na gestão organizacional, e ainda, promove o conhecimento de mercado, elaboração de estratégias e antecipação de tendências futuras, especialmente para pequenas organizações de serviços. Em termos metodológicos, o uso da Pesquisa-ação como estratégia no campo de estudo contribui para verificação da teoria-prática, cujo conteúdo pode servir como base de estudos futuros.

Palavras-chave: Inteligência Competitiva; Organizações de serviços; Pequenas empresas; Pesquisa-ação.

1 INTRODUCTION

The constant changes in the market pose a challenge for organizations: improving their ability to use resources to adapt to new business models and maintain a competitive position against their competitors. In response to this dynamic environment, companies tend to seek methods for operating with greater precision and reducing risks stemming from fluctuations in the organizational landscape, employing tools that provide the best direction for new processes and strategies for competitiveness (Cekuls, 2022).

In the service sector, marked by its heterogeneity and dynamism, companies must proactively recognize the characteristics and operational limitations of their services. Furthermore, they must consider the competitive aspects of the market to initiate the development of an appropriate strategy (Fitzsimmons & Fitzsimmons, 2000). Particularly, small companies in this sector must account for the intangibility, inseparability, variability, and



perishability of their services to remain competitive in an increasingly challenging business environment. It's noteworthy that the sector has exhibited significant growth, with a 4.7% increase in the first half of the year and a cumulative percentage of 6.2% over the last 12 months, indicating the ongoing dynamics within various sectors of this market (IBGE, 2023).

Additionally, in this volatile scenario, the large volume of information disseminated makes it challenging to filter out the most relevant content for organizations (Cekuls, 2022). Consequently, there is an urgent need for processes that facilitate the collection, interpretation, and effective utilization of information relevant to an organization. This necessity becomes even more significant when monitoring the external environment becomes a routine task, facilitating the development of anticipatory strategies and the identification of investment opportunities to achieve positive outcomes.

Considering this, information emerges as the primary input for decision-making to ensure an organization's survival in a competitive environment (Valentim, 2007; Andrade & Azevedo, 2018). Companies must have the capability to access and process data and information concerning their operating environment, including customers, competitors, suppliers, and emerging trends (Kahaner, 1997).

However, merely acquiring or producing information is insufficient to boost competitiveness in organizations (Andrade & Azevedo, 2018). It is also essential to use information as a resource that can be processed and transformed into intelligence, thereby serving as the foundation for decision-making and strategic planning (Valentim & Sousa, 2013; Cekuls, 2023). In this context, Competitive Intelligence (CI) emerges as an effective process for gaining a competitive advantage (Santarém & Vitoriano, 2016; Cekuls, 2022, 2023). CI also fulfills companies' information needs to support the decision-making process, ultimately improving organizational performance (Rahma & Sabri, 2023).

Thus, Competitive Intelligence, as a process, facilitates organizational adoption to trends and adds values (Isichei et al., 2023), through the ethical and legal identification, collection, analysis, and dissemination of data and information. It focuses on optimizing the decision-making process mitigating potential threats, and achieving a competitive edge (Tyson, 1998; Prescott & Miller, 2002; Gomes & Braga, 2017; Cekuls, 2023).

Thus, it's important to collect and process data and information gathered from the external environment, which, added to the individual's knowledge, will be converted into intelligence, as it offers support in the mapping of strategic planning and, above all, conducts the decision-making process (Gomes, & Braga, 2017). Tarapanoff (2006) adds that the purpose of the CI process is to enhance organizations' information capacity and adapt to changes in the external environment.

However, in the context of small companies, a structured and formalized process for collecting, analyzing, and disseminating information related to the competitive environment in which they operate is often lacking (Pereira; Carvalho & Quintão, 2019; Sousa & Toledo, 2019). Considering the issues discussed here, this research aims to present the process of implementing Competitive Intelligence in a small service organization.

This research is justified to the extent that, although there are studies that discuss the use of CI practices and tools in small organizations (Sousa & Toledo, 2019; Vasconcelos, Mendonça, Carneiro & Medeiros, 2019; Rocha, Carvalho and Aguiar Filho, 2021); the impacts of CI on the organizational structure (Craco, et al., 2016); strategy (Christo & Andalécio, 2016); or even in obtaining benefits from the application of CI (Rodrigues, & Sousa, 2022), discussions about the implementation process, particularly in small service companies, are limited. Therefore, this research holds practical relevance by detailing the process of CI implementation in the organization under study and suggesting techniques and tools that can be used effectively by small organizations.



Theoretical contributions include the application of the theory of Competitive Intelligence (Crane, et al., 2016) in the context of small service businesses. This study also offers a broader contribution by highlighting CI as a process that enhances organizational management, promotes market awareness, facilitates strategy development, and anticipates future trends, particularly for small service organizations.

2 COMPETITIVE INTELLIGENCE: CONCEPTS AND CHARACTERISTICS

Despite sparking discussions in the contemporary organizational context, Competitive Intelligence is still considered a relatively new concept, primarily due to the absence of a single, universally accepted definition. In general, CI can be understood as a systematic, ethical, and legal process for collecting and analyzing information about the competitive environment. Its purpose is to assist the decision-making process within organizations and enhance their performance and positioning in the organizational landscape (Fuld, 1995; Tyson, 1998; Prescott & Miller, 2002; Ahearne, Lam, Hayati, & Kraus, 2013).

According to Valentim (2006), CI is a dynamic management process whose input includes data, information, and knowledge of varying degrees of complexity related to business activities. This provides organizations with the potential for more secure and accurate performance in the economic scenario. In this context, Competitive Intelligence can be seen as a systematic process based on information that underpins the organization's short, medium, and long-term strategies, driven by the motivation for competition in the external environment (Hoffmann, 2011).

Recognized as an asset for modern management, CI's primary objective is to map the competitive environment to support decision-making (Colauto et al., 2004). To remain competitive, it is imperative to develop the ability to acquire and generate information about organizational scenarios, a factor that significantly influences the success of the decision-making process (Andrade & Azevedo, 2018). However, companies, especially micro and small ones, often lack essential information about the constant fluctuations in the market, making it challenging to generate timely and intelligent responses, seize opportunities, and mitigate risks.

The application of CI in organizational settings is partly driven by the increasing demand among managers for accurate, valid, and reliable information. Such information provides advantages and opportunities for exploring businesses and trends, with a particular focus on monitoring market developments and predicting changes, as well as the actions of competitors (Oliveira & Teles, 2015; Rothberg & Erickson, 2017; Sousa & Toledo, 2019). Additionally, advancements in technology and information processing have heightened the need for organizations to find new ways to integrate knowledge into their processes and disseminate information and techniques in a dynamic, simplified, and expeditious manner (Christo & Andalécio, 2016).

Promoting the use of CI within organizations can generate several benefits. By incorporating the CI process into the organizational environment, it becomes possible to reassess routines and competencies, implement new techniques, identify new opportunities, anticipate competitor actions, and expand into new markets (Kahaner, 1997). While its goal is to support the decision-making process, Competitive Intelligence also facilitates the early observation of customer and potential consumer needs, enabling strategic actions that lead to a competitive advantage and add value to the business. Hoffmann (2011) also indicates that Competitive Intelligence helps guide organizations strategically through constant changes, aiding them in understanding and determining the methods required to achieve a competitive edge.

CI is closely related to the techniques and tools of strategic planning, a subject discussed within the realm of Strategic Management. It is a cornerstone of the process of collecting and



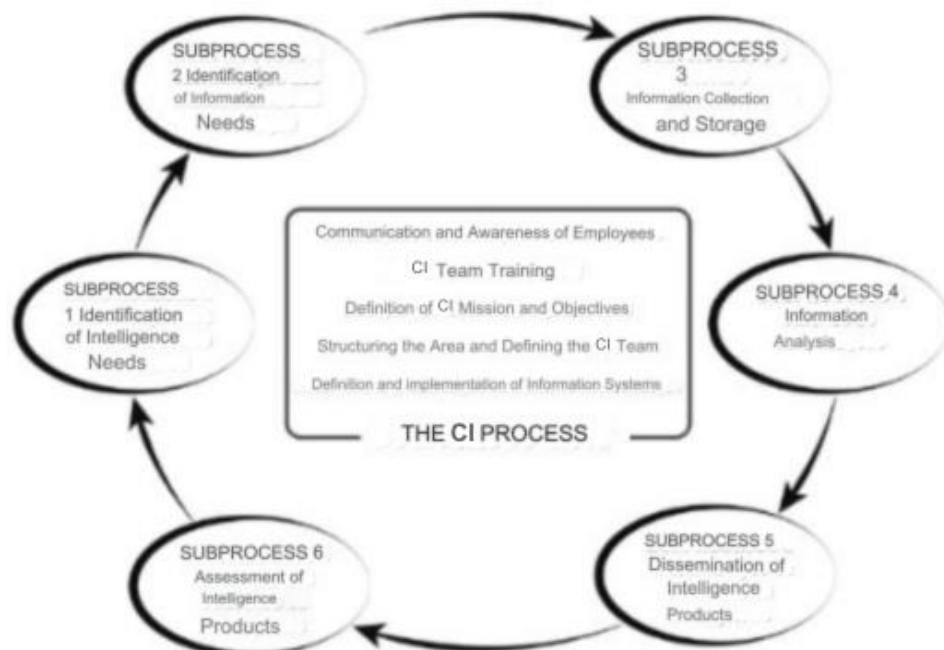
analyzing information to anticipate changes, based on the behavior of competitors and consumers. In this perspective, CI is linked to strategic, technological observation, and market research, making it an essential component of the strategic plan of actions and, consequently, a resource for continuous improvement (Maritz & Du Toit, 2018).

2.1 Competitive Intelligence Implementation Process

Competitive Intelligence can be classified in two ways: as a product and as a process. The product of CI is the result of the implemented process, encompassing the information or knowledge obtained for strategic purposes (Ribeiro & Oliveira Junior, 2021). Regarding the process, various models have been suggested by different authors, ranging between four and seven stages (Carvalho, 2021). Although there are differences in the number of steps or the nomenclature adopted, the content addressed by these models is similar, with most considering that the process concludes in the dissemination phase.

For this investigation, the model presented by Gomes and Braga (2004) was adopted, commonly referred to as the Competitive Intelligence System, which comprises five stages. Carvalho (2021) defines it as a set of tasks to monitor the competitive environment and build intelligence from data and information, facilitating its use in decision-making. In this model, a phase is added before the first stage of the implementation process, focusing on understanding the organization's intelligence needs to define the goals for the SCI (Gomes & Braga, 2017). The functioning of the CI cycle used in this research can be summarized according to Figure 1:

Figure 1 - CI Process



Source: Gomes e Braga (2017).

The initial sub-process, presented as the Identification of Intelligence Needs, has the mission of identifying which points require attention and how this should be done, considering the external environment. Establish the Key Intelligence Topic (KIT) and Key Intelligence Questions (KIQ), which are, respectively, the general and specific objectives enabling the direction of the CI process in companies (Herring, 1999). The second stage of the CI cycle, portrayed as Information Needs Identification, aims to detect, and compile what information



should be explored in the next stages of the process, to respond to the key topics and questions identified previously (Gomes, & Braga, 2017).

In the Information Collection phase, the organization of data collection stands out in the action of identifying and classifying the information collected from various sources, such as competitors, market trends, and key employees, who possess relevant and reliable materials to complement the previous phase (Carvalho, 2021). Subsequently, the Information Analysis stage begins, characterized by selecting, analyzing, and validating the information collected with the help of management methods or tools, depending on the final objective (Carvalho, 2021).

At the end of the analysis phase, it is followed by the Intelligence Dissemination stage, involving the delivery of the product generated in the previous stage to the respective users in a clear, objective, and coherent format (Gomes & Braga, 2017; Maróstica, Maróstica, & Branco, 2020), such as meetings, reports, presentations, etc., and providing possible recommendations to preserve competitive advantage. The final stage is responsible for evaluating the product and intelligence process, intending to identify flaws or positive points and the impact of CI within the organization (Gomes & Braga, 2017; Maróstica, Maróstica, & Branco, 2020).

It is noteworthy that the Competitive Intelligence process only adds value when it produces effective results and when it is put into practice by its users in decision-making. To ensure that the CI function is successful in its operationalization, several other activities must be performed within the organization (Gomes & Braga, 2017; Maróstica, Maróstica, & Branco, 2020).

3 METHOD

The present research follows a qualitative approach, as emphasized by Silva and Menezes (2000, p. 20), since qualitative research involves interpreting phenomena, attributing meanings, utilizing the studied environment as a data source, and relying on the researcher's active involvement in analyzing collected information. Additionally, qualitative research facilitates further study. In terms of objectives, this research is classified as descriptive, aiming to gather more information on a given topic to support and generate answers to the proposed problem concerning how and what (Sordi, 2017).

The research strategy employed was Action Research, which aligns with the qualitative approach as a theoretical model promoting active researcher participation and engaging other participants in the research process, linking it to the direct transformation of the studied phenomenon (Thiollent, 2009). The choice of this methodological strategy is justified as Action Research helps address organizational problems through the application of scientific knowledge to society (Lodi, Thiollent, & Sauerbronn, 2018). The operational model was used, consisting of four interdependent phases: i) exploratory phase; ii) analytical phase; iii) active phase; and iv) evaluation phase (Lodi, Thiollent, & Sauerbronn, 2018).

For this study, a reconciliation between the phases of Competitive Intelligence implementation and Action Research was executed. Initially, the Identification of Intelligence and Information Needs phases were linked to the exploratory phase of Action Research. Actions were undertaken to collect data through discussions about intelligence needs and semi-structured interviews with managers conducted from 04/12/2023 to 05/12/2023, defining KITs, KIQs, and informational needs for subsequent phases. Content Analysis (Dellagnelo & Silva, 2005) was applied to verify the data collected in interviews and later to assess information for collection.

In the Analytical phase of Action Research, determined actions included presenting intelligence and information needs through conversations with managers to expose defined



KITs and KIQs. Additionally, the articulation of information collection with the definition of main information sources was indicated.

Proceeding to the Active phase of Action Research, the phases of Information Collection and Analysis were executed. Data on actions and products marketed by competitors were collected through research on the websites and social networks of selected competitors. Information on consumers' main needs when purchasing an insurance product was gathered through word evocation (Vergara, 2005), involving customers of the studied organization, and data categorization from the ReclameAqui website.

Analysis of the collected information was conducted using benchmarking and thematic content analysis. Comparative analysis aimed to identify differences between competitors and the organization studied, complemented by the application of an Excel spreadsheet for synthesis and result adequacy of the word evocation analysis with consideration of repetition in consumers' reports.

In the Dissemination phase of the Intelligence product, aligned with the evaluation phase of Action Research, the structuring and dissemination of the intelligence product occurred, presenting findings and recommendations after completion of the process. Actions were controlled, and the effect of KITs and KIQs was evaluated through final presentations with managers to assimilate incorporated knowledge and guide actions to maintain Competitive Intelligence in the organization.

From the reconciliation between the phases of action research (Lodi, Thiollent, & Sauerbronn, 2018) and the Competitive Intelligence process (Gomes & Braga, 2017), it is evident that specific collection and analysis techniques were adopted for each stage, aligned with the study's general objective. Thus, data triangulation (Abdalla et al., 2018) and analysis techniques (Denzin, 2012) were employed to meet the study's objective.

The research focused on an insurance brokerage company, a small private organization in Fortaleza/CE, operating in services through insurance brokerage since 2002. The organization, with five employees and two partners, divides sectors into financial and operational, estimating an average monthly revenue of BRL 200,000. It offers various services, including general insurance sales, from auto insurance to professional indemnity insurance, catering to a diverse range of customers, such as youth, adults, businesses, condominiums, etc.

The chosen organization lacks any strategic management model monitoring the external environment for information useful in decision-making. This absence of a model or process aligns with findings from Sousa and Toledo (2019), Vasconcelos, Mendonça, Carneiro, and Medeiros (2019), and Rocha, Carvalho, and Aguiar Filho (2021) on aspects of Competitive Intelligence in small organizations. Subsequent subsections will detail the implementation process of Competitive Intelligence through action research methodology.

4 RESULTS AND DISCUSSIONS

4.1 Intelligence and information needs identification

The exploratory phase of the action research applied in this study aimed at identifying intelligence and information needs. In this context, three semi-structured interviews were conducted, guided by a script with three broad questions regarding the influences of the external environment on the company's operations. The participants in this phase were the partners and the general manager of the organization, selected to identify sensitive points to be addressed in this initial stage. The profiles of the interviewees are detailed in Chart 1:



Chart 1 – Interviewees profile

	Office	Age group	Service Length	Gender	Graduation
E1	General Manager	25 years old	10 years	Female	Management
E2	Majority shareholder	45 years old	Since the foundation (2002)	Female	Chemistry
E3	Majority shareholder	51 years old	Since the foundation (2002)	Male	Insurance Management

Source: Prepared by the author (2023).

The interviews underwent content analysis (Dellagnelo & Silva, 2005). Subsequently, *posteriori* categories were compiled, corresponding to the syntheses obtained after processing the collected data and presenting the common points identified in the interviewees' statements (Carmo, 2018).

Upon analyzing the responses, a convergence in findings emerged regarding investment opportunities, emphasizing the importance of introducing new products to expand the market portfolio and enhance financial results. The general manager of the studied organization reported:

I believe that a point that can be mentioned in our case, something that I already see in the company daily, would be the issue of benefits, products aimed at a benefit. Nowadays people are much more concerned with this issue of health care, with health, I would say. So, I think that is a point that we can explore further.

Regarding critical decisions, the majority shareholder considered the issue of differentiation from the competition due to the market's growth as a pivotal decision to be analyzed. The objective is to develop a distinct service model, as per his statement:

Observing the external environment, the decision to analyze how the company can stand out from the competition because as the market has been growing more and more, and whether there is a good demand, I think it is worth thinking about how we can work so that customers see that our service is differentiated.

Concerning critical challenges, the interviewees reflected on the necessity of monitoring market changes to adapt to new business patterns. They also emphasized the importance of tracking competitors' actions and assessing customer needs in this sector, given the significant number of brokers and the specific requirements of each consumer. The partner of the organization concludes:

First, dealing with sales is a challenge because there are customers whose profile is not the easiest to deal with, but we already know how to talk to them so that they understand and close the insurance renewal [...]. The issue is also of competition, it is a market that anyone can enter, sell insurance, receive commission and that is it. It gets more tiring because we must fight with our weapons to sell our service.

From the analysis conducted in this phase, the organization Intelligence Need was identified, specifically the need for extensive monitoring of market players. This involves defining topics to gather data and information on specific markets, aiming to create a profile or conduct a specific evaluation of a given player (Herring, 1999). In this case, the players are customers and competitors. Given this intelligence requirement, the following Key Intelligence Topics (KITs) and Key Intelligence Questions (KIQs) were defined (Gomes & Braga, 2017):

KIT: Monitoring of services offered by competitors and customer demand.

KIQ 1: What are the actions of competitors to sell diversified products?



KIQ 2: What products are currently sold by competitors?

KIQ 3: What are the specific needs of customers when seeking insurance?

Subsequently, the work was conducted to identify the necessary information to address these key issues. For KIQ 1, it was suggested to conduct market research with at least two competitors to outline their behavior in the sale of diversified products. Regarding KIQ 2, it was proposed to compile a list of products sold by the competitors investigated in the research. As for KIQ 3, it was recommended to map the needs expressed by customers when searching for insurance, along with potential issues with the services provided. The goal is to verify and analyze recurring sensitive points reported by consumers of the service in general.

Following this, the analytical phase of the action research was carried out with the presentation of the KIT and KIQs to organize the study through a conversation for understanding and validation by the interviewees. Once validated, they provided suggestions for sources of information collection to address the key issues raised. In this context, the interviewees recommended competitors that could be analyzed to gather information about KIQs 1 and 2.

4.2 Information Collection, Storage, and Analysis

In this study, the active phase of the action research addressed the activity of information collection, which involves organizing data collection, as well as identifying and classifying the captured information, following the competitive intelligence process. Also, the analysis of information, which is responsible for selecting and transforming the raw data collected during the collection process, is crucial for consolidating the intelligence product (Carvalho, 2021).

To address KIQ 1, two competitors (X and Y) of the analyzed company were selected. Competitor X, operating since 1997 with headquarters in Fortaleza and branches in Natal and Mossoró, focuses on selling products for automobiles. Competitor Y, also with 26 years of experience, is based in Fortaleza and concentrates its sales on business and property products.

The choice of these competitors was based on suggestions made by the interviewees in the previous research phase and the idea that competitors can serve as sources of information (Ferreira, Jardim & Ziviani, 2018). The techniques employed included a) personal observations by the researcher and b) searches on the websites of the selected competitors to obtain relevant inputs from the indicated source.

For KIQ 2, it was found that competitors X and Y equally categorize the products they market into two sections: personal solutions and solutions for companies. During the information collection for the second key question, it was observed that both competing companies have the same commercialization portfolio, showing little differentiation in the products offered.

Addressing KIQ 3 involved a two-stage information collection process. The first stage investigated thirty clients belonging to the portfolio of the company under study, chosen for accessibility and convenience. The word evocation technique (Vergara, 2005) was employed during data collection, using a stimulus question to identify specific needs when purchasing insurance. Respondents were asked to indicate in one word what made them consider purchasing insurance. The result showed repetitions of the word "security" (8 mentions), unlike the other three words (tranquility, trust, and precaution), which were mentioned only once.

In the second stage of collecting data for the third KIQ, a survey was conducted through the ReclameAqui website to identify the most recurrent complaints about the services of insurance brokers. The choice of this platform over others, such as social networks and search engines (Google), was due to its specific and systematic aggregation of customer complaints about services from an external, public, accessible, and valid source for obtaining information for competitive intelligence purposes (Ferreira, Jardim & Ziviani, 2018; Cekuls, 2022). The



descriptor "insurance broker" was applied in the search field, indicating that the main types of problems reported by consumers were poor service (860 complaints), miscellaneous, uncategorized problems, mainly related to situations of undue collection (629 complaints), and delay in the progress of processes (426 complaints).

Once collected, the information was analyzed with the support of techniques aligned with the needs of the KIT and established KIQs. For KIQ 1, a comparative analysis was conducted by benchmarking how the organization under study treated the sale of diversified products compared to other analyzed competitors. It is important to highlight that benchmarking is already a familiar technique for small businesses (Rocha, Carvalho & Aguiar Filho, 2021) and can be used in the CI process (Andrade & Azevedo, 2018). An initial finding was that the studied company lacks websites or social networks to attract customers, unlike competitors X and Y, which actively promote these platforms to engage with consumers.

After collecting and analyzing the information, it was observed that competitor X's approach to selling its products was based on demonstrating the usefulness of the product through catchphrases. Conversely, competitor Y's approach for the commercialization of diversified products emphasizes the need for acquisition and provides evidence for argumentation, such as laws and reports. In comparison to competitors, it was found that the method adopted by the company under study to reach customers for the commercialization of diversified products is through referral marketing. Loyal customers return seeking to contract other insurance products and refer them to other customers.

For KIQ 2, according to benchmarking analysis, competitors X and Y have the same portfolio of commercialized products, categorized into personal solutions and business solutions. When comparing with the researched organization, it was identified that it also sells the same products. However, it was noticed that there is an effort to boost sales volume with personal benefit products, such as health plans, life insurance, and civil liability.

Concerning KIQ 3, for which the data were analyzed through thematic analysis, the most repeated information was the word "safety." Regarding the search on the ReclameAqui website, the most cited problem was the issue of poor service. Reflecting on the repetitions found, it is evident that when seeking the service to purchase an insurance product, the customer implicitly places the need to be protected in the face of any occurrence. Therefore, the identified point of sensitivity lies in the demand for care in the face of a risk occasion, and not being attended to as expected.

One of the main points identified in the analysis phase was the difference in how the analyzed competitors and the studied organization portray the importance and usefulness of diversified insurance products to sell other lines to their customers. Additionally, it was observed that the products marketed by the analyzed competitors are presented in the same way as consumers perceive them, demonstrating breadth in the sale of their products without bringing specificity to the business. Furthermore, it was also identified that many customers seek the insurance service for security. Conversely, poor service on risky occasions is the primary reason for complaints from consumers of the service, a point that should be avoided to preserve the relationship with customers.

4.3 Competitive Intelligence product dissemination

For this investigation, the evaluative phase of the action research corresponded to the dissemination phase of the intelligence product, with the aim of identifying the most appropriate format for delivery to managers or decision-makers, making it more accessible, clear, coherent, and practical (Gomes & Braga, 2017), containing possible recommendations for maintaining a competitive advantage.



In this sense, the elaboration of an Executive Summary was defined as the summary of the information collected during the process, along with guidelines that add value and assist in the decision-making process to achieve a competitive advantage. The purpose of the Executive Summary is to directly and objectively respond to the Key Intelligence Topics (KITs) and Key Intelligence Questions (KIQs) identified in the CI process through the presentation of the scenario and suggestions (Rother, 2009; Tres & Cândido, 2010). The choice of format was indicated according to the context in which the study company is inserted, as the Executive Summary can meet the needs of small organizations that require concise and accessible information.

Considering the structuring of the intelligence product given the determined format and the needs of the company studied, the formal language for developing the content to be addressed in the summary was verified (Gomes & Braga, 2017; Maróstica; Maróstica & Branco, 2020), with a focused distribution to be delivered to the majority shareholders and the general manager of the organization. Thus, the product was made available in printed form on the wall of the management room and saved as a digital file in the cloud of the system used by the company. The periodicity defined for sending the Executive Summary was monthly, punctually at the monthly meeting of managers.

The topics selected for structuring the product covered the approach of competitors X and Y in the commercialization of diversified products according to the information collected, indicating the possibility of developing another means of contact with the studied organization, such as websites, virtual assistants, and social networks. Additionally, participation in events and fairs aimed at the active sector was suggested to seek more knowledge in the products sold. Furthermore, activities focused on customer service were indicated, such as automated customer service and exclusive employees, emphasizing improvements to this task.

The delivery of the consolidated intelligence product in the format of an Executive Summary was carried out for the partners and the general manager of the organization studied through a conversation, explaining the main aspects found through the Competitive Intelligence process. At the same time, guidance on how to apply the recommendations indicated in the product and integrate the Competitive Intelligence process as support for permanent management in the company under study was provided.

Relevant points to be worked on for the permanence of the CI activity in the organization were raised, namely: a monthly meeting to discuss and verify possible signs of improvement concerning external changes; analysis of new products or products on the rise in the market to develop competitive techniques; and setting up an information management strategy to facilitate access to important data when requested.

Regarding the dissemination of the intelligence product to the organization, all participants expressed positive opinions as feedback about the findings and recommendations presented in the document. In general, there was a consensus regarding the performance of the activities, given the elaboration of a detailed strategic plan. According to Jin and Bouthillier (2013), three elements impact the functions of CI in an organization: the dynamism of the sector in which the organization operates; the skills and knowledge of the CI professional; and valuing senior management through a culture that encourages information sharing. In short, Domenes and Urdan (2019) conclude that, in addition to the dedication and interest shown by Competitive Intelligence professionals, companies also need to be prepared to improve their objectives, goals, and processes.

5 CONCLUSIONS

This study aimed to discuss the process of implementing Competitive Intelligence in a small service organization through the application of the Action Research methodology. In this



way, it was considered the stages of Identification of Intelligence and Information Needs, addressing both the exploratory and analytical phases of action research, as well as the stages of Collection and Analysis of Information in the active phase. The study concluded with the Dissemination of the Intelligence product, from the perspective of the evaluative phase.

Given this, the proposed actions defined in the methodology section were implemented. A priori, the potential points fitting the operation of the CI process were identified. This was followed by a deepening of these issues through semi-structured interviews with decision-makers in the organization studied. The result was the definition of the key topic regarding the monitoring of services offered by competitors and customer demand, accompanied by three key questions to specify the process of seeking information.

Following this, the Key Intelligence Topics (KIT) and the Key Intelligence Questions (KIQs) were presented to the subjects participating in the research to verify the necessary information that met the identified needs. The sources of information for data collection were then listed, and the competitors' websites and contact networks were analyzed. Additionally, contact with the organization's customers and the use of the complaint site ReclameAqui were employed to enhance the analysis.

From that point on, the information collection phase operated based on the indicated sources, capturing the necessary data to support the analysis phase. It was identified that the selected competing companies used different approaches in the sale of diversified products but had the same configuration of marketed products. Moreover, through the method of evoking words and reports seen in ReclameAqui, it was revealed that the specific needs of customers related to the studied service are based on safety and good service.

Through the analysis of the collected information, using validated analysis techniques, it was observed that the study organization did not employ the same approach methods to clients, pointing out a weakness and possible threat. Additionally, it was concluded that the studied company prioritizes personal benefits more than the analyzed competitors. On the issue of consumer demand, the analysis identified topics to be developed to meet customer needs, such as individualized service strategies.

Consequently, the conclusion of the information for structuring the Intelligence product in the Dissemination phase was obtained. In this context, the characteristics of the organization under study were considered to construct an accessible and facilitated document to achieve effectiveness in the CI implementation process. The appropriate format was determined to be the Executive Summary, containing summaries of the findings, and indicated recommendations, presented with a formal language and a monthly periodicity for sending the product, aiming at focused distribution. Upon delivering the Summary, the points crucial for the continued success of CI as a strategic process for monitoring the organizational environment were reinforced with the team.

In this sense, this work contributes both to the organization under study and to other small organizations in the service segment by dealing in detail with the Competitive Intelligence implementation process. It demonstrates that CI is a process with full capacity to work in a small organization. Moreover, the application of CI also provided insights into the tools and techniques that can be applied to various contexts. In theoretical terms, the research contributes by applying Competitive Intelligence theory in the small business context, especially using the Action Research methodological strategy, reconciling the theoretical with empirical findings.

However, this study presents a limitation: the impossibility of performing the last stage of the CI implementation cycle, referring to the Evaluation phase of the process or the Intelligence product implemented, given the time available for the development of this research. For future investigations, it is suggested as a research agenda to include the Evaluation phase of the CI process to detail the contributions of the product and the process itself to the organization studied. Additionally, it is recommended to develop research that combines



Competitive Intelligence with other theoretical bases, such as strategy and competitiveness, especially in small organizations, to evaluate all aspects pertinent to the application of the process. Furthermore, it is important to encourage the use of the Action Research methodology in works in the field of Applied Social Sciences, bringing together the theory studied and the practice experienced in the market.

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