

The Strategist's Playbook: Managing a Strategic Watch Project

Chapter 4: From Insight to Impact - Planning, Teams & Sources

- ✓ Master the end-to-end management of a watch project
- ✓ Learn to build and lead an effective intelligence team
- ✓ Systematically identify and evaluate information sources

"Strategy without execution is hallucination. Execution without intelligence is suicide." – Adapted from Thomas

Edison

The Watch Project Lifecycle

What is a Watch Project?

A **time-bound, goal-oriented initiative** to answer specific strategic questions using the intelligence cycle.

It's a **formal project**, not ad-hoc research.

- ✓ Each phase has specific deliverables and gates
- ✓ Ensures quality and alignment with objectives
- ✓ Transforms raw data into actionable intelligence



The 5-Phase ILifecycle:

1. **Initiate & Scope**
2. **Plan & Design**
3. **Execute & Monitor**
4. **Analyze & Report**
5. **Review & Transition**

Phase 1: Initiate & Scope - The Project Charter

The Foundation Document

A one-page "**contract**" that authorizes the project.



Business Case

Why this project? What problem does it solve?



Key Intelligence Topics (KITs)

The core questions (e.g., "What are the market entry risks for Country X?")



Key Stakeholders

Who will receive and use the intelligence? (e.g., CEO, Product Manager)



Success Criteria

How will we know we succeeded? (e.g., "Deliver a validated list of top 5 competitive threats by June 1")



Constraints

Budget (often time), timeline, and scope boundaries

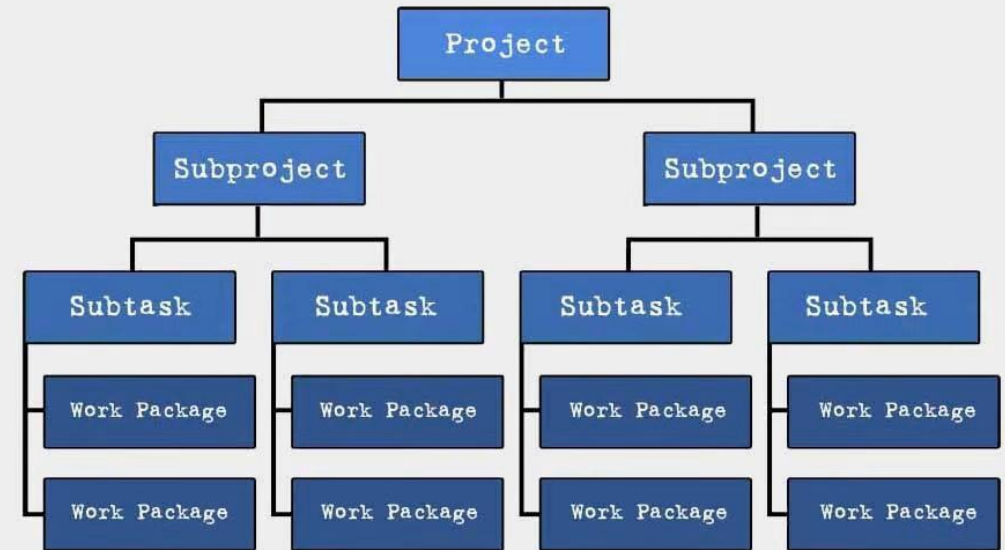
Phase 2: Plan & Design - The Work Breakdown Structure (WBS)

The Task Map

Breaking the project into **manageable pieces**.

- ✓ Prevents overwhelm
- ✓ Allows for task assignment
- ✓ Enables tracking
- ✓ Creates clear deliverables
- ✓ Defines scope boundaries

WORK BREAKDOWN STRUCTURE



Phase 2: Plan & Design - The Project Timeline (Gantt Chart)

Visualizing the Schedule

A bar chart showing **tasks against time**.

Tasks

From the Work Breakdown Structure

Durations

Hours/days for each task

Dependencies

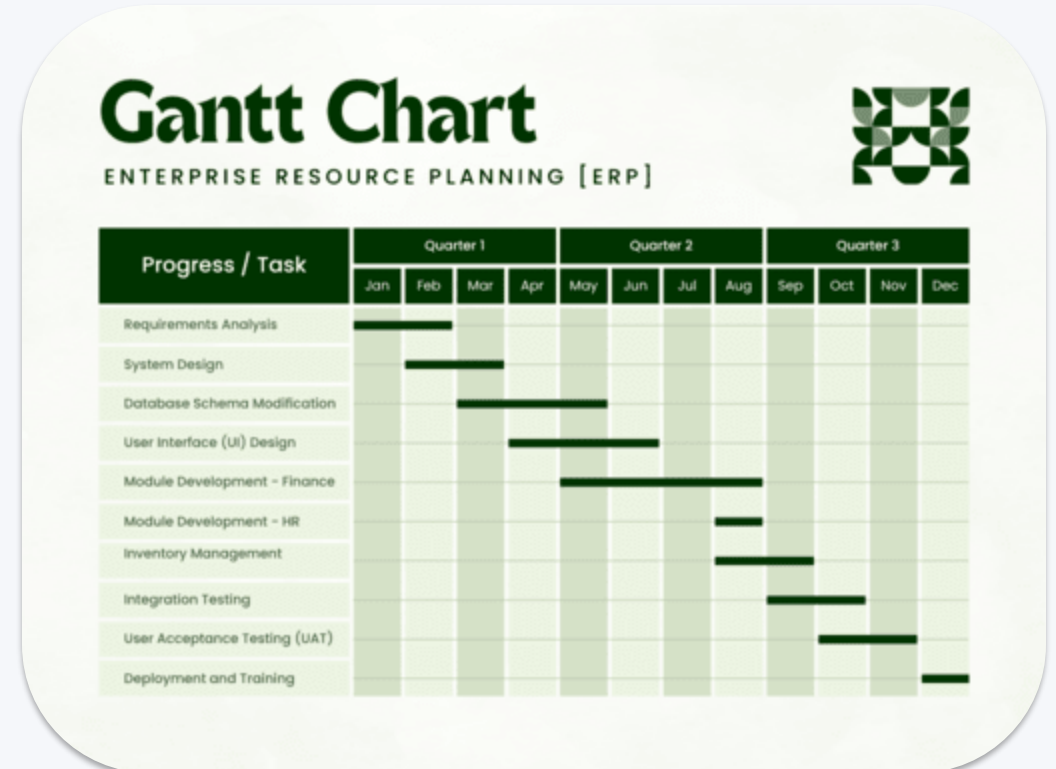
Task B cannot start until Task A is finished

Milestones

Key deliverables (e.g., "Draft Source List Complete")



Use free tools: Google Sheets, Trello Timeline Power-Up, or Asana



Phase 3: Execute & Monitor - The Collection Dashboard

Operational Control Center

Where you **track the execution** of the plan.

Project Hub

Use Trello or Notion to create a central dashboard

Status Lists

To Do | In Progress | Awaiting Analysis | In Analysis | Report Ready

Cards/Entries

Each card represents a piece of information, a source to check, or an analysis task



Daily/Weekly Ritual: 15-minute team meetings to update status, solve blockers, and re-prioritize

Collection Dashboard Example

Competitive Threat Assessment - Q2

To Do

Check competitor patents

Monitor social media mentions

Review industry reports

In Progress

Analyze quarterly earnings

Expert interviews

Awaiting Analysis

Regulatory filings

Market data

In Analysis

Pricing comparison

Market share analysis

Report Ready

Technology trends

Phase 4: Analyze & Report - The Synthesis Workshop

Turning Data into Insight

A **team sport**. Don't analyze in isolation.



Pre-Work

Team members bring their top 3 findings to the meeting



Converge

Use a Miro/Mural whiteboard. Cluster findings into themes



Debate & Interpret

Discuss: "What does this cluster mean? What's the 'So What?'"



Define Recommendations

Based on the meaning, what should the company do?



Output: The raw material for your final report

The Workshop Format

1

Pre-Work

Individual preparation



2

Converge

30 mins



3

Debate & Interpret

30 mins



4

Define Recommendations

30 mins



Phase 5: Review & Transition - The Retrospective & Handoff

Never Skip the "Lessons Learned"

The retrospective is **critical** for improving future watch projects.

 **What went well?** (Process, tools, teamwork)

 **What could be improved?**

 **Did we answer the KITs?** Where were we wrong or surprised?



The project isn't done until intelligence is used. Schedule a briefing with stakeholders.

The Review & Transition Process



Retrospective Meeting

Team reflection on successes and challenges



Stakeholder Briefing

Walk through findings, answer questions, discuss next steps



Archive

Store all raw data, notes, and reports in a shared drive



Transition

Hand off to decision-makers for action planning

The Intelligence Team: Essential Roles

A Team Effort

A watch project is a **team effort**, even in small organizations. Roles can be combined but must be **clear**.



Sponsor/Stakeholder

Asks the questions, consumes the intelligence, has budget authority



Project Manager

Owens the timeline, runs meetings, removes blockers, ensures delivery



Collection Specialist

The "detective." Expert in finding information from various sources



Analyst

The "sense-maker." Identifies patterns, challenges assumptions, builds the narrative



Editor/Communicator

Crafts the final output, ensures clarity and impact for the audience

The Core Intelligence Team



Sponsor/Stakeholder

The Question Asker



Project Manager

The Process Owner



Collection Specialist

The Detective



Analyst

The Sense-Maker



Editor/Communicator

The Storyteller

Building Psychological Safety

The #1 Factor for Team Success

A shared belief that the team is **safe for interpersonal risk-taking**.



Analysts can voice a **wild interpretation** without ridicule



Collection specialists can **admit limitations** in finding information



Team members feel safe **disagreeing** with the project manager



Leader's Duty: Admit mistakes first, frame work as learning, not execution

How to Foster Psychological Safety



Admit Mistakes First

Leaders model vulnerability by acknowledging their own errors



Frame as Learning Problem

Treat challenges as opportunities to discover, not execution failures



Use "Yes, and..." Instead of "But..."

Build on ideas rather than immediately critiquing them



Celebrate Intelligent Failures

Reward well-reasoned hypotheses that proved wrong

Effective Team Communication Protocols

Rule 1: Over-communicate

Clear communication prevents misunderstandings and ensures alignment across the intelligence team.

Project Hub (Trello/Notion)

Source of truth for tasks and status. Async, permanent.

Instant Messaging (Slack/Teams)

For quick questions, alerts, and coordination. Sync/Async, ephemeral.

Video Calls (Zoom/Meet)

For weekly syncs, analysis workshops, and stakeholder briefings. Sync, rich.



If it changes the project plan or is a key finding, it goes in the Project Hub, not just chat.

The Communication Stack



Project Hub

Async • Permanent • Source of Truth



Instant Messaging

Sync/Async • Ephemeral • Quick Coordination



Video Calls

Sync • Rich • Complex Discussions



In-Person Meetings

Sync • High-Bandwidth • Critical Workshops

Running Effective Team Meetings

The Weekly Sync Agenda (30 mins max)

Every meeting must have a **clear agenda** and **outcome**.



Good News/Progress (5 mins)

Quick wins? "I found a great source on..."



Dashboard Review (10 mins)

Are we on track? Any tasks stuck in "In Progress"?



Blockers & Help Needed (10 mins)

What's stopping us? How can the team help?



Next Steps & Action Items (5 mins)

Who does what by when? Record in Project Hub.



No "status update" meetings—read the dashboard instead.

Source Typology: The P.O.S.T. Framework

A Framework to Categorize All Information Sources

A systematic approach to classify intelligence sources for **comprehensive coverage**.



P - Primary

Information you create/get directly (Interviews, Surveys, Experiments). **High value, high effort.**



O - Observational

Information from watching behavior (Store visits, Trade show observations, User session recordings). **Context-rich.**



S - Secondary

Information that already exists (News, Reports, Websites, Social Media, Patents). **Our main focus.**



T - Technical/Digital

Machine data (API feeds, Web traffic analytics, Sensor data).
Requires technical skill.

Evaluating Source Credibility: The C.R.A.P. Test

A Quick, Memorable Checklist

A systematic method to **assess any source** before using it in your intelligence analysis.



C - Currency

How recent is the information? Is it still relevant?



R - Reliability

Is the source known for accuracy? Is it peer-reviewed or from a reputable institution?



A - Authority

Who is the author/publisher? What are their credentials? What is their potential bias?



P - Purpose/Point of View

Why was this information created? To inform, sell, persuade, or entertain?

Source 1: Government & Regulatory Databases

Official Data from Governments

Data from governments, central banks, EU, WTO, UN, patent offices (e.g., USPTO, WIPO).



Patents

Reveal a company's **R&D focus** and future products years in advance.



Trade Data

Reveal **supply chains**, import/export volumes.



Regulatory Filings

For public companies, 10-K, 10-Q reports contain mandatory **risk disclosures** and strategic priorities.



Example: Searching the Algerian patent database (INAPI) for patents filed by a local telecom company.

Key Government & Regulatory Databases



Patent Offices

USPTO • WIPO • EPO • National patent offices



Regulatory Bodies

SEC • FDA • FCC • National regulators



International Organizations

UN • WTO • World Bank • IMF



Trade & Commerce

Customs data • Import/export statistics

Source 2: Company "Footprints"

The Digital Trail Every Company Leaves

Clues scattered across the internet that reveal **strategic intent** and **future plans**.



Career Pages

The **ultimate signal**. Job titles, departments, required skills = future strategy.



"About Us" & Press Releases

Changes in mission, executive team, office locations.



Website Code & Changes

Use view-source or Visualping to track changes in pricing, product descriptions.



Domain Registration Info

Use whois lookup to see when domains for new products were registered.

Tracking Company Digital Footprints



Career Pages

Job postings reveal future focus areas and strategic priorities



Corporate Communications

Press releases and executive bios signal strategic shifts



Website Changes

Product updates, pricing changes, new feature announcements



Domain Registrations

New product names, market expansion, brand extensions

Source 3: The "Gray Literature"

Information Outside Traditional Publishing

Produced **outside commercial or academic** publishing channels.



What It Includes

White papers, technical reports, theses, conference proceedings, pre-prints, government reports, working papers, newsletters.



Why It's Gold

Contains **cutting-edge, specialized, and unfiltered** information before it becomes mainstream news.

Where to Find Gray Literature



Academic Repositories

Google Scholar • University Research Databases



Industry Associations

Professional Organizations • Trade Groups



Pre-print Servers

arXiv.org • SSRN • bioRxiv



Government Publications

Technical Reports • Research Studies

Source 4: Human Networks & Experts

The Highest-Value, Highest-Risk Source

Human Intelligence (HUMINT) provides **unique insights** unavailable through other sources.



Attend Conferences & Trade Shows

Listen to talks, network at coffee breaks.



Conduct Expert Interviews

Under a clear, transparent pretext.



Monitor Expert Social Media

Follow key engineers, scientists, or analysts.



Never misrepresent your identity or intent to extract confidential information.

Ethical Methods for Human Intelligence



Industry Events

Conferences • Trade shows • Professional gatherings



Expert Interviews

Transparent purpose • Clear identity • Respect boundaries



Social Media Monitoring

LinkedIn • Twitter • Professional networks



Professional Networks

Industry associations • Alumni groups • Advisory boards

Building a Source Library (The Source Deck)

Don't Rediscover Sources for Every Project

Create a **centralized database** of valuable intelligence sources.



Platform

Use Notion or Airtable to create your Source Deck.



Fields

Source Name, URL, Type (POST), Topic/Industry, Credibility Score, Notes, Last Checked Date.



Process

Every time you find a great source, add it to the deck.



Build a proprietary, curated database that becomes a key organizational asset.

Your Source Deck Structure



Source Name & URL

Algerian Patent Database (INAPI) • inapi.dz



Type (POST) & Industry

Secondary • Technology • Government



Credibility Score (1-5)

4/5 • Official government source • Updated quarterly



Notes & Last Checked

Best for telecom patents • Check monthly • Last: June 10

Managing Source Fatigue & Bias



Challenge 1: Source Fatigue

Relying on the same 2-3 easy sources (e.g., only Google News).



In your WBS, mandate use of **at least one source from each P.O.S.T. category.**



Challenge 2: Confirmation Bias

Seeking only information that confirms pre-existing beliefs.



Assign a team member the **"Devil's Advocate" role** to actively find evidence disproving leading hypothesis.

Additional Bias Mitigation Strategies



Diverse Perspectives

Include team members with different backgrounds and viewpoints



Source Rotation

Regularly rotate which team members monitor specific sources



Time Delays

Delay final conclusions to allow for reflection and counter-evidence

The Final Deliverable: The Intelligence Report

A Compelling Story That Drives Action

It's not a data dump. It's a **strategic narrative** that informs decision-making.



Executive Summary (1 page)

Headline conclusion, key supporting arguments, and recommended actions.



Body (3-5 pages)

Detailed analysis, evidence, and data visualizations supporting the summary.



Appendices

Methodology, source list, raw data tables for reference.



Design Principle: The stakeholder should get 90% of what they need from the first page.

The Pyramid Principle Structure



Executive Summary

Key findings • Recommendations • Action items



Supporting Arguments

Evidence • Analysis • Insights



Data & Details

Sources • Methodology • Appendices

Project Risk Management

Common Risks in Watch Projects

Proactively identify and mitigate risks to ensure project success.



Scope Creep

Stakeholder keeps adding "just one more question."



Refer to the **Project Charter**. New questions = new project phase or new project.



Information Drought

Critical information simply isn't publicly available.



Have **backup KITs**. Pivot to analyzing the implications of the information gap itself.

Additional Risk Mitigation Strategies



Team Burnout

Collection and analysis are cognitively draining



Rotate Tasks

Switch team members between collection and analysis roles



Celebrate Milestones

Acknowledge achievements to maintain motivation



Enforce Reasonable Deadlines

Build buffer time into project timeline

Ethics Reminder: The Clean Hands Doctrine

Ethical Management from Start to Finish

Your project must be **ethically managed** throughout its entire lifecycle.



Team Ethics

Respect confidentiality of sources and findings within the project. No internal leaks.



Source Ethics

Adhere strictly to the "**publicly available information**" rule. Document your sources for all key findings.



Use Ethics

Intelligence is to inform better decisions, not to harm competitors illegally or unethically. Consider the long-term reputation of your organization.

Ethical Intelligence Principles



Transparency

Be clear about your identity and purpose when gathering information



Legal Compliance

Adhere to all applicable laws and regulations



Objectivity

Present findings without bias or manipulation



Respect

Consider the impact of your intelligence work on all stakeholders

Capstone Exercise: Build Your Project Charter

Your Final Practical Task

Apply everything you've learned to create a **complete project charter**.



Scenario

You are hired by "EcoTech DZ," a startup making solar-powered irrigation systems. They want to expand to Tunisia.



KITs

Define 1-2 Key Intelligence Topics for market entry.



Stakeholders

Identify 3 Key Stakeholders who will use the intelligence.



Success Criteria

List 2 Success Criteria to measure project effectiveness.



Sources

Propose 4 Sources (one from each P.O.S.T. category).

Your Project Charter Template



Business Case

Why expand to Tunisia? What market opportunity exists?



Key Intelligence Topics

What are the regulatory barriers? Who are local competitors?



Key Stakeholders

CEO • Head of Sales • Product Manager



Success Criteria

Validated market entry strategy • Risk assessment report



Information Sources

Tunisian agricultural ministry • Local distributors • Market research • IoT sensor data

Conclusion: You Are Now a Watch Project Manager

From Theory to Execution

You have mastered the **complete framework** for managing strategic intelligence projects.



Process

The lifecycle (Initiate, Plan, Execute, Analyze, Review).



People

The team roles, safety, and communication.



Sources

The P.O.S.T. framework and CRAP test.



"The goal of a watch project is not to produce a report. The goal is to change a mind and inform an action."

The Trinity of Competence



Process

Initiate & Scope • Plan & Design • Execute & Monitor • Analyze & Report • Review & Transition



People

Team Roles • Psychological Safety • Communication Protocols • Effective Meetings



Sources

P.O.S.T. Framework • CRAP Test • Source Library • Risk Management



Ready to Lead

You have the knowledge, tools, and frameworks to manage strategic intelligence projects effectively