

Meeting the Immediate Needs of Intelligence Consumers

A Corporate Process to Serve More People More Fully

Andrew Shepard--CIA, 13 June, 1995

Overview: Intelligence can address the immediate needs of a wider range of key national security decision makers--more quickly, comprehensively and efficiently--if we integrate some of our traditionally independent operations into a corporate process that is specifically aimed at performing the close-support mission. We could develop a corporate process that is similar to efficient "just-in-time" operations in the private sector, as outlined below. Close-support could be driven by requests coming from officers who serve each key consumer on site. Information about immediate needs could be sent directly to every employee who might participate in the response. The right intelligence officers could be assigned quickly and efficiently to address each immediate need, largely through self selection. Corporate information systems (using commercially supported products) could facilitate rapid formation of the work teams required to meet each need. The information systems also could capture statistical data, as each request is logged and answered, that would help managers discover patterns and trends in the work we do on various topics using various resources under various circumstances.

The problem: our historically successful business processes have become outmoded.

Consumer-support processes that were responsive enough in the past are no longer sufficiently agile to meet the constantly changing immediate needs of a wide range of decision makers. We work as hard as ever, but standards of adequacy have risen:

Attitudes toward the value of intelligence have changed. Consumers judge us more by our ability to help on specific problems that are here today and different tomorrow. Satisfaction depends heavily on what we've done lately for each one.

Intelligence products, on average, must integrate the knowledge of a larger number of employees. The world today--politically multipolar, economically integrated, electronically interconnected--poses problems that often are more complex than in the past. A modern problem can have many political, military, economic, and technical dimensions; it often requires the goals of many governments to be considered, and increasingly requires that non-government groups and independent actors be taken into consideration as well.

Time is short. Rapid and open communications around the world have increased the frequency with which new developments are reported to our consumers, putting pressure on them to make decisions in less time. If intelligence is to add value, it must learn about the consumer's problem and make an input more quickly.

We can no longer produce one product for many consumers, created and delivered on our own schedule. Consumers are inundated with information--a result of rapid growth in external information sources and services and the openness inherent to many of the countries now important to US foreign. Our consumers often read only intelligence that is custom tailored to address their immediate and individual problems. Many would prefer to discuss the intelligence in person.

These factors have already forced us into new business practices. We do much more close support than before, for example, and more briefings in place of papers. But we have discovered that close support entails more employees working together on each item; and there is less time for this collaboration to happen; and each product must be tailored to an individual, rather than serving many at once; and there is more information to be collected and analyzed; and we have fewer people to do all this... Something must give. Processes inherited from the previous era are not well matched to today's needs.

There seem to be ways to do much better.

The general practice of providing close support to customers who need one-of-a-kind products on short notice is not unique to intelligence. It is similar to operations that have undergone substantial improvement and "reinvention" in the private sector in the past ten years. If we were to design a new process for providing close support to intelligence consumers, we could learn many helpful lessons from external successes and failures. Some of the most useful tips might come from the experience of organizations that reduced their personnel ranks, cut production costs, and shortened response times through a combination of changes aimed at enhancing "just-in-time" production.

Several basic capabilities appear to determine an organization's ability to serve customers on short notice with one-of-a-kind products. These capabilities are familiar:

- Gathering data on disparate customer needs quickly and accurately.
- Disseminating information about a consumer's need, to everyone in the business who must participate in the response.
- Deciding quickly whether the business can respond, who will participate, and what each person or component will contribute by when.
- Facilitating the teamwork required for each unique product.
- Keeping the sales and services representatives informed and involved (essential to minimize error, when products are one-of-a-kind).
- Capturing information on the performance of the overall operation.

The following pages discuss each of these capabilities, in the context of redesigning intelligence operations for more efficient and agile performance in the close-support mission. The discussion suggests how alternative operations could add up to a corporate process that is more streamlined and responsive. The goal is not to improve one or two of the capabilities individually, but to find a coherent set of changes that could yield a much more effective overall process for meeting immediate needs.

Identifying immediate needs: we could benefit from a fully staffed service corps.

Much of the purpose of spending billions of dollars on intelligence capabilities each year is to meet the immediate needs and concerns of key consumers. Most of the good we can do, in the eyes of consumers, is in the close support mission. We also have responsibilities to warn, to generate longer range intelligence, and to maintain contingency capabilities--but even the benefits from these missions often depend on access that we develop through close support. With such a heavy dependence on understanding the immediate needs of key consumers, we should be willing to allocate a significant portion of our operating budget to this capability. Today, we spend less than 1% on this business area, so we have room to grow without significantly affecting other operations.

A good way to enhance our knowledge of constantly changing consumer needs would be to deploy intelligence representatives to serve each key consumer on site. This would put in place a work force that could perform many of the critical functions that sales and service people perform in organizations where "just-in-time" support is critical. Our own experience confirms that having an intelligence officer involved in day-to-day meetings and activities of the key consumer is a cheap and highly effective way to learn of opportunities for intelligence to make a difference. We acquire intimate knowledge of the issues that each consumer is wrestling with each day. We learn about meetings that are on the consumer's agenda, and what the consumer hopes to achieve at those meetings. We also learn what external information the consumer is using or could use.

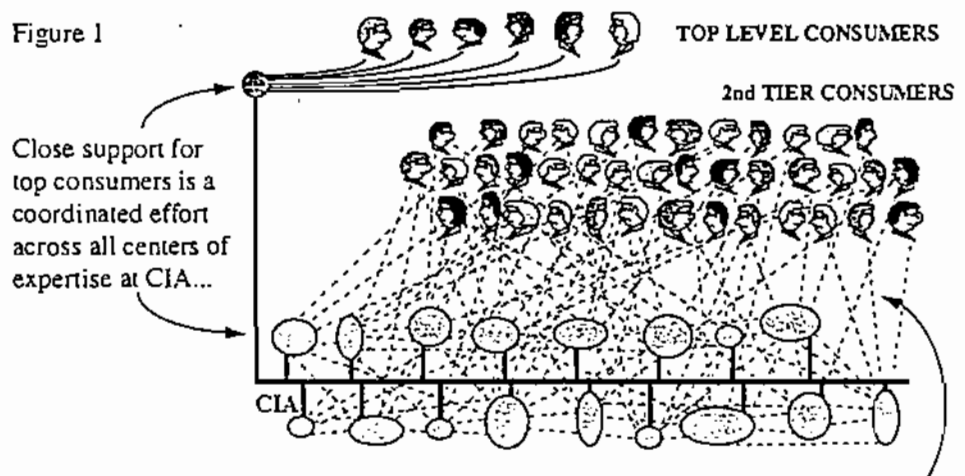
We need this kind of information every day, for every consumer, if we are to tailor our work to meet their individual needs. But experience tells us that a consumer often does not know what intelligence might be helpful, and does not know how to describe his or her needs in a way that would take advantage of intelligence strengths. An intelligence officer involved in the consumer's daily routine, on the other hand, can readily imagine specific kinds of information that would be useful (and feasible) to provide. The proposal here is to make on-site representation part of the formal mechanics of providing close intelligence support to key consumers--an element of the intelligence process that is not an option, if the consumer is to be among those receiving priority service.

* This could become a matter of definition: consumers for whom intelligence officers "drop everything" to meet immediate needs are defined as those for whom we maintain on-site support. We would regularly review our list of the most important decisions makers in the national security area--perhaps once a year or at the beginning of a new administration--and ensure that an appropriate intelligence officer is assigned to each one. The list could grow or shrink, depending on White House guidance and funding.

Distributing news about consumer needs: we could benefit from the speed and dissemination capabilities that electronic networks offer.

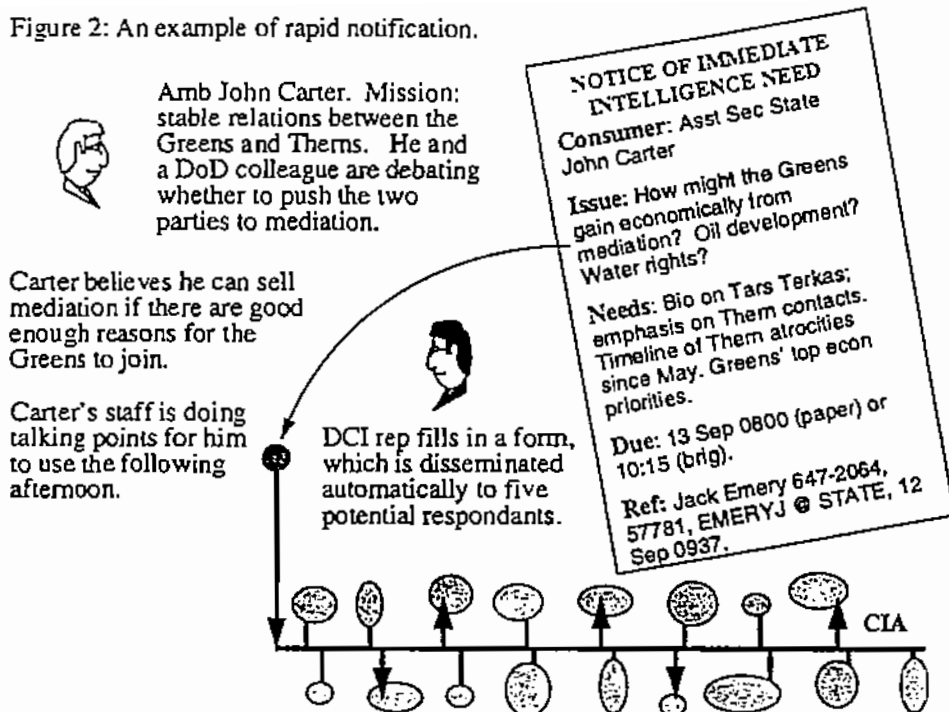
We need to distribute information about consumer needs to all who should get it, in all the collection and analysis components that have information and expertise to contribute. Because many of today's consumer issues require consideration of political, economic, technical, military, national, regional, non-governmental, and other factors, the task of identifying all who should be told of a request can be difficult. Today we have an institutional process for ensuring that the right employees learn quickly about the needs of the top few decision makers, but we are somewhat fragmented when it comes to serving the many dozens of critical second-tier decision makers in the national security field (see Figure 1). We do our best to involve all the right people when we learn of an immediate need, but it is hard to know who all the right contributors might be for a specific response, and to notify all these potential contributors in time to respond, when the deadline is short.

Figure 1



The proposal here is that we design an institutional process that underlies our service to second tier consumers, so that the intelligence that they receive is as responsive and as broadly based as service to the top consumers. To manage the problem of many consumers and many centers of expertise, we would use our electronic networks to send notification of each consumer need to all potential contributors--even before deciding who will actually participate in the response. Each employee would receive *all* the notices that are pertinent (and *only* the notices that are pertinent) to his or her areas of responsibility. In this way, each employee would be immediately aware of opportunities to use his or her knowledge to support key decision makers, and could begin thinking about possible responses immediately (see Figure 2).

Figure 2: An example of rapid notification.



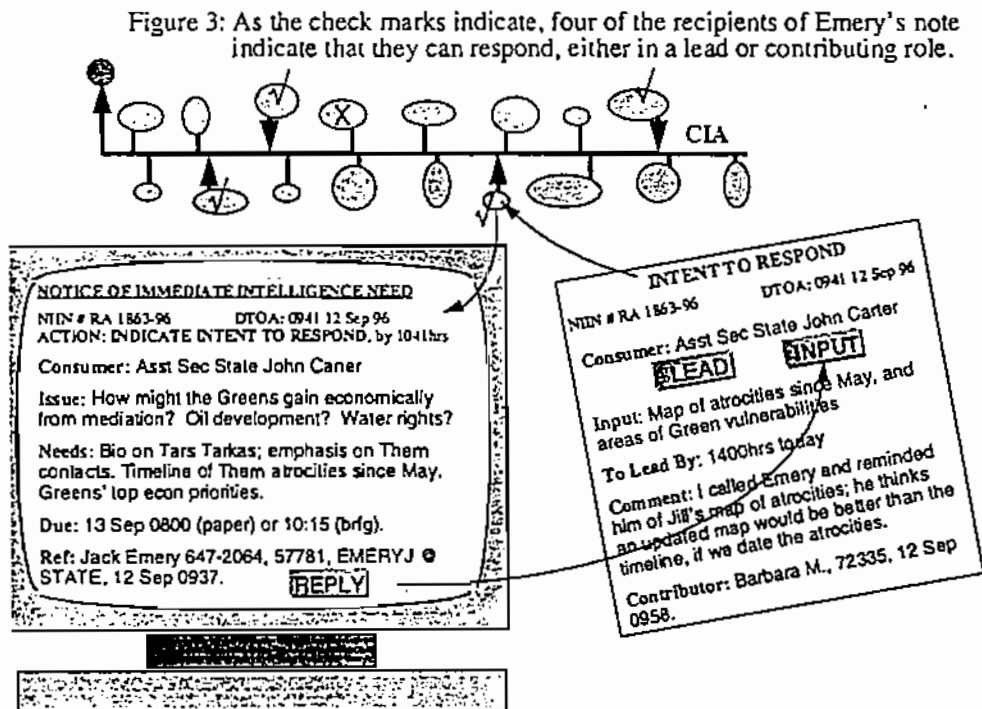
As suggested in Figure 2, we could design a rapid and efficient notification capability around a shared information network that registers all information about consumer needs in simple format, and which electronically disseminates the information to the right potential contributors based on topic. Commercial message distribution software can do this easily--comparing the language that describes the need to language in employee profiles that define individual capabilities and responsibilities. An early approach might be to use SAFE profiles to send notices to those employees whose information needs match the text used in a consumer-need message. Eventually, employee profiles might be defined largely by a combination of manual description and actual output--automatically updating the institution's knowledge of each employee's capabilities and responsibilities based on what they actually produce. Another option might be to post notices of consumer needs in an electronic file in Lotus Notes, after automatically indexing and organizing the messages into many different categories (countries, topics, etc) that different groups of analysts would regularly monitor.

Messages about immediate consumer needs would come from multiple sources. Most would come from on-site representatives, but many other employees would also learn of consumer needs--in the course of giving briefings or in telephone conversations, for example, or by reading an article written by the consumer, or while attending a meeting. We would not want to exclude any sources of information about immediate opportunities to provide close support. Rather, we would want a single corporate reporting system by which all data about immediate needs could be logged and then acted upon in a corporate manner--regardless of who may be entering the information about a particular consumer need. (This may require some cultural changes. Some outside organizations have found that, after providing *capabilities* for sharing data, not much sharing actually happened. Incentives had to be developed and built into the system to reward sharing.)

Deciding who should address each need: the participants probably know best.

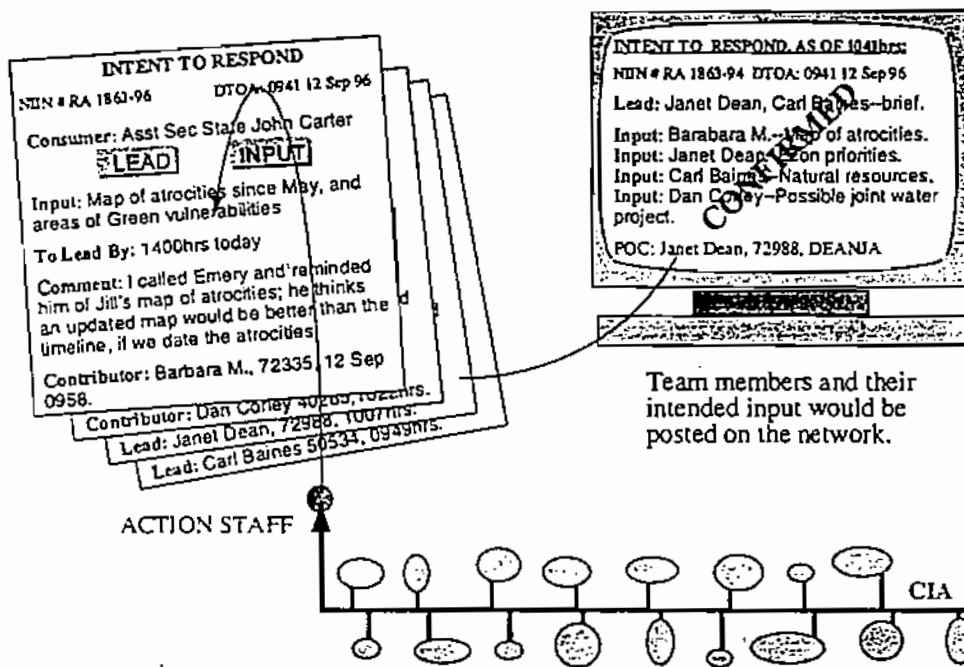
As an institution, we need a way to decide what we intend to do with each request for support. And, since we are talking about immediate support, the decision process has to be fast. We would need to know, in each instance, whether we are accepting the request, who is on the hook to answer it, and when each contribution has to be made. Today the decision process is largely hierarchical, with built-in delays that are nobody's fault but which are inherent to hierarchical processes. There is often insufficient time to include more than a few people in decisions about who should respond to particular needs. Lead responsibility often is given to one person who is then responsible for enlisting other inputs and completing coordination. As noted earlier, however, a wide range of countries and issues can bear on the consumer's options. Any one lead author is unlikely to know all the employees who could contribute valuable information; or is unlikely to reach all those people; or may not be able to elicit a contribution. External experience suggests that we can make faster and better task assignments, if employees are given the training and information necessary to make most of these decisions on their own.

The proposal here is to create a process that depends primarily on employee self-selection, as the initial means by which consumer needs are quickly matched with available resources. This is a significant departure from past practice, but, in an environment where employees are constantly working on many different projects and may be out of the building, central or hierarchical decision making can be too slow and yield suboptimum choices. By directly informing employees about newly arriving "orders," and by letting each cast an initial vote about participating in the response, we could find that the people who should be working on a given task generally do. The process could happen very quickly and with very little management assistance (see Figure 3) although some oversight would be required to deal with occasional overlaps or underlaps in coverage.



The method of signing up to participate, as a contributor or a task leader, could be via a simple reply to the consumer-need message. (The system could facilitate this step by automatically noting the date, time, and employee name. Employees might simply type a brief message describing the nature of proposed contributions.) We could make use of the same information network that disseminates the initial information about a consumer request. Electronic mail on the network could also allow employees to communicate with the originator of the consumer-need message and with each other. There would be a deadline for employees to indicate their availability to make an input to each response--a time at which all the proposed inputs would be reviewed by a small action staff that serves the close-support mission, as shown in Figure 4.

Figure 4: A small action staff would document the intended intelligence response.



The process proposed here leaves open the question of how best to involve senior substantive experts in reviewing particular responses for quality assurance. A senior group of substantive experts might sign off on finished products, for example. Or, a line manager in the lead author's component might perform this function. The need for speed, however, and the increasing use of phone calls and briefings to meet immediate consumer needs, tend to make any layered review process somewhat impractical. It might be better to require that each response team include within it a senior member whose job is to perform the quality assurance role. Here, again, we confront a possible cultural change: the senior team member might perform a quality assurance role best if he or she is not also a supervising manager. We might want to rethink our traditional practice of combining substantive review roles and management roles in the same positions.

Intelligence projects have rarely generated this kind of information to help managers oversee and improve operations. It has been very hard in the past to know what a product or service cost--and the work required to keep track of each thing we do, and its impact, did not seem to be a wise use of resources. But times have changed; the need to know more about the cost and impact of what we do has increased enormously, and the options for doing so have become much more affordable. We can deliberately organize our "just-in-time" support to intelligence consumers in a way that automatically captures much of the management data we need. We can use the data to learn how we are doing and spot ways to improve; we can demonstrate our capabilities to new consumers or hard-eyed overseers; and we can use the data in strategic assessments to understand the utility of various intelligence assets for addressing various kinds of intelligence needs. We can also use the data to monitor our balance of immediate and long range efforts; to show which assets are over subscribed; and to anticipate future consumer needs.

The proposal here is to design data-capturing tools into the information systems that support the corporate close-support mission. We can design the system to make a record whenever we receive a request, for example, and give that request a number. We can record our decision whether to respond, as we pass along that decision to the requester. Whenever we choose to respond--which will be the usual case--we can record the identity of the people contributing to the response and the delivery date promised. We can easily note the times when various steps in the response process are completed, and when the response is delivered. All of this can happen automatically, in the background. And when a team generates a draft product--a paper, talking points for a phone call or briefing, graphic materials, etc--we can record the materials used, including any source references. (It is already our habit to cite certain references for internal clearance purposes; we can choose as an institution to require reference citations for any other major pieces of information as well. There are some rough ways to acknowledge even the uncited information that helped team members to support a particular project.)

We can assign an approximate cost to each response upon its completion, taking into account the costs of the team members and supporting infrastructure, and estimating the costs to collect and process the data that was used. To estimate costs, however, we would need to do a better job of apportioning our costs of annual operations, which are well documented, to the activities actually accomplished during the year. An example would be to divide the costs of a collection operation by the number of intelligence reports generated each year, to derive an approximate unit cost for the average report. We could do this for each major data source. While this might seem alarmingly superficial, please note that the purpose is not to ascribe a value to any individual report. Such "average unit costs" would not be meaningful for any individual report or photograph. But, when aggregated over a year's worth of collection and use of intelligence, the data could give us unprecedented and statistically reliable insight into the uses to which our various resource were put. This could yield much better management data than we now have, as managers try to determine which initiatives might have the greatest impact for the available funds.

Finally, we can design the close-support process to improve our collection and use of feedback from key consumers. Part of the improvement can come simply from having on-site representatives for each consumer, who can either elicit or deduce some useful feedback for many products. But feedback comments could come from other sources as well. Having a formal record and information workspace related to each project could facilitate the recording and use of feedback from any source, associated with a specific product. In addition, for many projects, there would be certain attributes of success or failure that could be determined fairly automatically--for example, whether the project met the deadline, or whether various optional materials were ever printed out.

Developing reliable measures of the data and assets used in each one-of-a-kind product will require experimentation. There are many things we could measure, almost automatically and at very little cost; the question is whether they would mean what we think they mean. We might need to conduct pilot operations for a number of years, to build up the sort of accounting information necessary for apportioning costs, as described above--and might need to forgo any formal use of the statistics until we could show all parties that the results are meaningful and useful. The point in this paper is simply that we would have an unprecedented opportunity--in developing a corporate process for meeting the immediate needs of a wide range of key consumers--to make our supporting information systems collect much of the raw data necessary for these better measures, if we do a bit of planning. For more detail on possible intelligence measures, see "Developing Measures of Performance," 6 March, 1993.

Conclusions

We can identify officials whose work is so important to national security that we should give them priority service in our daily intelligence activities. When one of these key consumers needs support, our goal is to know about it and respond. Since deadlines are often short, we want to learn of each intelligence-support opportunity as quickly as possible; we want to disseminate that information to potential contributors as quickly as possible; we want to quickly determine which employees are most appropriate and available to meet the need; and we want to help the collaborating team members do their work as quickly as possible. Today, many different and disconnected methods exist to do these things. They limit the service we can provide to all but the top few consumers.

We could develop an integrated set of operations to replace today's fragmented approach to meeting the immediate needs of key consumers. Information systems and work arrangements could be redesigned specifically to strengthen the close-support mission--to spread the word about immediate consumer needs; to facilitate rapid identification and grouping of potential collaborators; to make their work more efficient; and to track what we do--using systems and procedures that are specifically designed to reinforce one another. It is therefore within our power to greatly increase the speed and flexibility with which we bring our many intelligence capabilities to bear on the immediate needs of a large set of key consumers, even though our work force is shrinking.