
Exercise 7-1. Business intelligence checklist.

Directions: Complete the following steps for exercise 7-1. Accomplishing this exercise finishes your work on step 2 of the financial value process: research financial information. If you prefer not to write in this book, go to the companion Website (astd.org/astd/publications) to download a PowerPoint file for this exercise.

1. Select a business intelligence source such as a Website and list the key points and discoveries in the most appropriate row of column III as you read your source. The most appropriate row depends on whether your discovery relates to knowledge about your audience (STEP 1), about general financial information (STEP 3: General), or about profit (STEP 3: Profit), position (STEP 3: Position), or cash (STEP 3: Cash).
2. Make sure to note the source of your point or discovery in column II. You may need to go back and check your reference later, and it might be hard to remember where you learned your information.
3. Write any additional questions that you would like to have answered in column IV. This will help you work more efficiently in future meetings, conduct research more rapidly, or write emails or memos looking for additional information.
4. Repeat steps 1 through 3 of this exercise as necessary. It's helpful to plan on keeping an ongoing worksheet of business intelligence because information is always changing. In chapter 11, you'll see why planning to update your research and communicating your value on a quarterly basis makes a big difference as to how your value is perceived by your audience.

(continued on next page)

	I	II	III	IV
		Research Source	Key Points and Discoveries	Questions
1	STEP 1: Audience			
2				
3				
4	STEP 3: General			
5				
6				
7	STEP 3: Profit			
8				
9				
10	STEP 3: Position			
11				
12				
13	STEP 3: Cash			
14				
15				