

SIR 2025
**Annual
Conference**

CHICAGO, IL
Fairmont Hotel in Chicago

May 4-6, 2025



Before They Cut You:

Proving Strategic Value Before It's Too Late

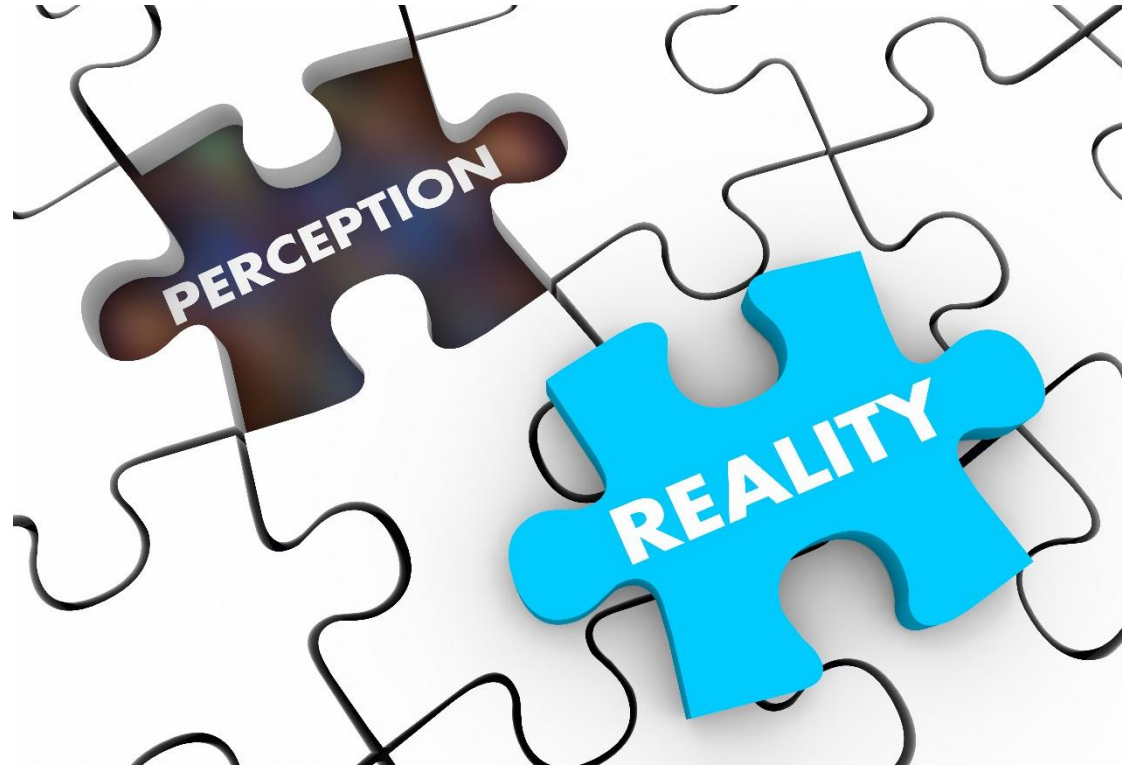
David Kalinowski, Proactive Worldwide, Inc.

May 5, 2025

Leadership Increasingly Thinks It's AI that Delivers the Benefits – Not Humans

AI is *not* replacing you.

It's leadership's *perception of what AI can do* that threatens your role!



We Humans Must Show Our ROI

- A. Radius of Influence
- B. Rate of Interest
- C. Record of Invention
- D. Return on Investment
- E. Republic of Ireland
- F. Risk of Incarceration



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Calculating ROI

Simple ROI Calculation

$$\text{ROI} = \frac{\text{Benefits}}{\text{Costs}} \text{ or } \frac{\text{Benefits} - \text{Costs}}{\text{Costs}}$$

- ROI > 0 is Good
- ROI < 0 is a Bad

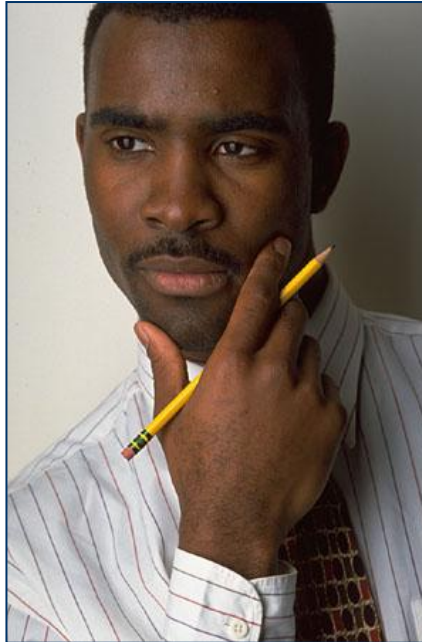
Determining the “Benefits” is the Most Challenging Part of the Equation



Why Do We Need to Determine CI ROI?

What's in it for you?

- ➔ Credibility
- ➔ Reputation
- ➔ Monetary rewards
- ➔ Value
- ➔ Institutionalizes CI
- ➔ More resources
- ➔ Reduces anxiety
- ➔ Keep your job



What's in it for your organization?

- Proactive vs. reactive ←
- Resource allocation ←
- Business growth ←
- Improves planning ←
- Stability in difficult times ←
- Reduces costs ←
- Saves or makes time or money ←
- Supports research investment ←



Obtain Direct Input from the Stakeholder



Potential Metrics to Measure



SEVERAL AREAS EXIST TO SHOW CI VALUE

QUANTITATIVE MEASURES

- Boost win rates
 - Generate cost savings
 - Avoid costs
 - Make faster decisions
 - Grow market share
 - Improve NPS
 - Retain customers
 - Increase revenue
 - Raise profitability
 - Save time
 - Enrich the customer experience
 - Identify new opportunities to seize
 - Extend product life cycle
 - Enhance productivity
-
- ### QUALITATIVE MEASURES
- Stimulate new thinking to solve problems
 - Avoid of surprises
 - Teach Leadership something new
 - Drive / Support M&A actions
 - Boost Leadership's decision-making confidence
 - Develop effective strategies
 - Contribute to the business plan
 - Generate ideas for new products/services
 - Mitigate threats
 - Obtain positive testimonials from stakeholders





So, after you know what to **MEASURE** ... then what?

You have to **ASSESS IMPACT**

Top 6 Questions to Ask a Stakeholder Before Starting a Project

1. What specific decisions, actions, or strategies will this project directly influence?
2. What business goals or KPIs will this work help move the needle on?
3. What outcomes would make you say, “This was a valuable project”?
4. What would happen if we didn’t pursue this project now?
5. Do you anticipate this work saving the company time, money, or risk? If so, how?
6. Before we begin, how confident are you in your current decision path?



Top 6 Questions to Ask a Stakeholder After Delivering Results

1. How did the insights influence your upcoming decision(s)? In what way?
2. Based on the success metrics you set, how well did we deliver against them?
3. What percentage of your decision was informed by the intelligence we provided?
4. Can you estimate the dollar value tied to the decision(s) this project supported?
5. Would you be willing to provide a testimonial about the value this work added?
6. How has your confidence in your decision changed?





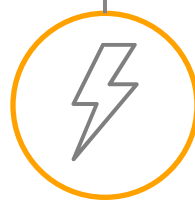
CI's value (its ROI) can be demonstrated by assessing its impact in several categories



Time Frame

Long-term
(strategic decisions)

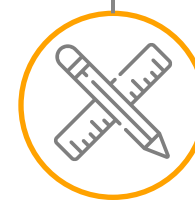
Short-term
(tactical decisions)



Level of Impact

Direct
(clear correlation between intelligence and subsequent management decisions)

Indirect
(intelligence that contributes input to management decisions)



Measurement

Quantitative measures

Qualitative measures



Examples



**Reduce Costs and
Increase Productivity**



**Assess Competitor's
GTM Strategy**



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What if the stakeholder gives you “no input”?



Create **Credible, Reliable,**
Believable and **Defendable**
Assumptions and Conclusions*





What department should be the research function's **best friend** when it comes to assessing the impact?

FINANCE

Knowing what to **MEASURE**
and **ASSESSING** the **IMPACT**
of what you measure are
NOT enough to demonstrate
value and ROI.

We must **REPORT**
that information.
Without **REPORTING**,
nothing happens!



Report Results with an Executive Flash Report (EFR)

Research Function produced an ROI of 2400%, which includes direct impact of \$10 million.

5 projects impacted millions of dollars worth of decisions.

- 4 of 5 project requests came from the executive team.
- All 5 projects had a direct impact on major decisions.

Demand for research services increased 25% from all current stakeholders

CI project requests expanded from 2 departments to 5.

- Current requests are coming from R&D, HR, Operations, Marketing, and Sales

100% of current stakeholders engaged in multiple projects

Internal satisfaction with the MR / CI function at over 98%.



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ROCI® Intelligence Summary Dashboard

ILLUSTRATIVE

	Pro No.	Dept	Client	Client Score Card	Internal/ External \$ Costs	Indirect Impact	Direct Impact	Testimonials/ Quotes
	201	R&D	R. DeNiro	4.5	25,000	Helped to identify unmet market needs and ID 100s of new potential clients	Helped us land a \$1M contact	“The research got us one new client so far that we would have missed”
	202	HR	C. Diaz	4.7	50,000	Saved time and money related to recruiting, hiring and training	\$4M sales force cost avoidance	“Launching another sales team would have been a waste of money”
	203	OPS	M. Freeman	5.0	100,000	\$5M in cost savings by upgrading order entry software	Not clearly identified by client	“I didn’t even know that kind of software was available.”
	204	MKTG	J. Nicholson	4.3	175,000	Extended resources dedicated to brand to continue incremental growth of earnings	Contributed to brand making \$3M/month	“If we acted on the rumors, we would have lost a bundle”
	205	Sales	J. Roberts	4.6	50,000	Cost savings and higher productivity by modifying sales structure and compensation plan	\$2M in savings	“Changing the structure based on competition’s model was essential”
Total	5	5 Depts	3 new clients 2 repeat clients	Avg. 4.6	\$400,000	CI impacted decisions involving millions of dollars	\$10 million	

Estimated ROI (benefit - cost/cost x 100) from Direct Impact = 2400%

OR for every \$1 invested the return was \$24

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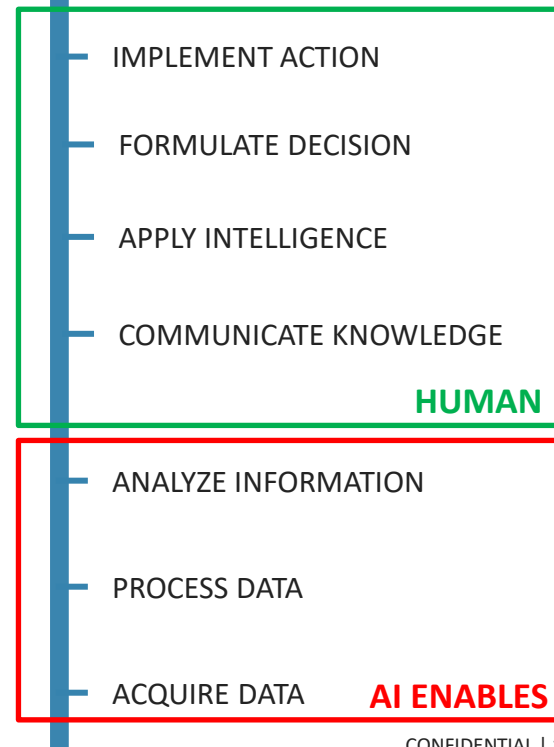


AI Enabled- vs Human-Required Contributions to the Knowledge Value Chain

Intelligence
and Analysis
Adds Value



VALUE Knowledge Value Chain*



Source: Tim Powell, modified by David Kalinowski

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Leadership's Top 8 Arguments About AI – And How You Flip Them (1 of 2)

Leadership Argument	Your High-Impact Response
AI is faster and more efficient than human teams	Speed is meaningless if it leads you in the wrong direction. AI can deliver data faster, but only human intelligence can ask the right questions, interpret the gray areas, and connect the dots that matter most. AI without context is just faster noise.
AI reduces operational costs significantly	Yes, AI reduces costs—but at what long-term expense? Human-led insights prevent costly mistakes, regulatory risks, and reputational damage that automation alone can't foresee. Strategic value beats short-term savings every time.
AI eliminates human bias in analysis	AI doesn't eliminate bias—it buries it. Algorithms are trained on historical data, which often includes embedded prejudices, so there is an illusion of objectivity.
AI can analyze more data than any team could	AI can swim in oceans of data. But only human experts know where to fish, what's worth keeping, and what to throw back. Volume isn't value.



Leadership's Top 8 Arguments About AI – And How You Flip Them (2 of 2)

Leadership Argument	Your High-Impact Response
The competition is investing heavily in AI—so should we	Just because the competition is doing it doesn't mean it's smart. Many are rushing into AI without a clear plan.
AI tools are constantly improving and self-learning	AI gets smarter over time—but without human input, it gets dangerously confident in its own blind spots. Ethics and nuance, and don't self-train.
We can repurpose budget from human insights to more tech	Redirecting budget without clear ROI leads to strategic drift. Replace experience and foresight with automation, and you risk becoming reactive rather than proactive.
Human teams are too slow to meet today's decision cycles	Speed doesn't win—*timely relevance* does. Human-led insights are slower by design because they evaluate, anticipate, and align with business goals. A rushed decision that misses the mark is more damaging than a thoughtful delay.



You must be a “Strategic Interpreter of Meaning”

A professional who not only gathers and analyzes data but also contextualizes and communicates insights in a way that aligns with organizational strategy, ensuring that intelligence leads to informed decision-making that drives action and results.

Humans create meaning – and that’s what leadership needs to make smart decisions!





What is your
Culture?!



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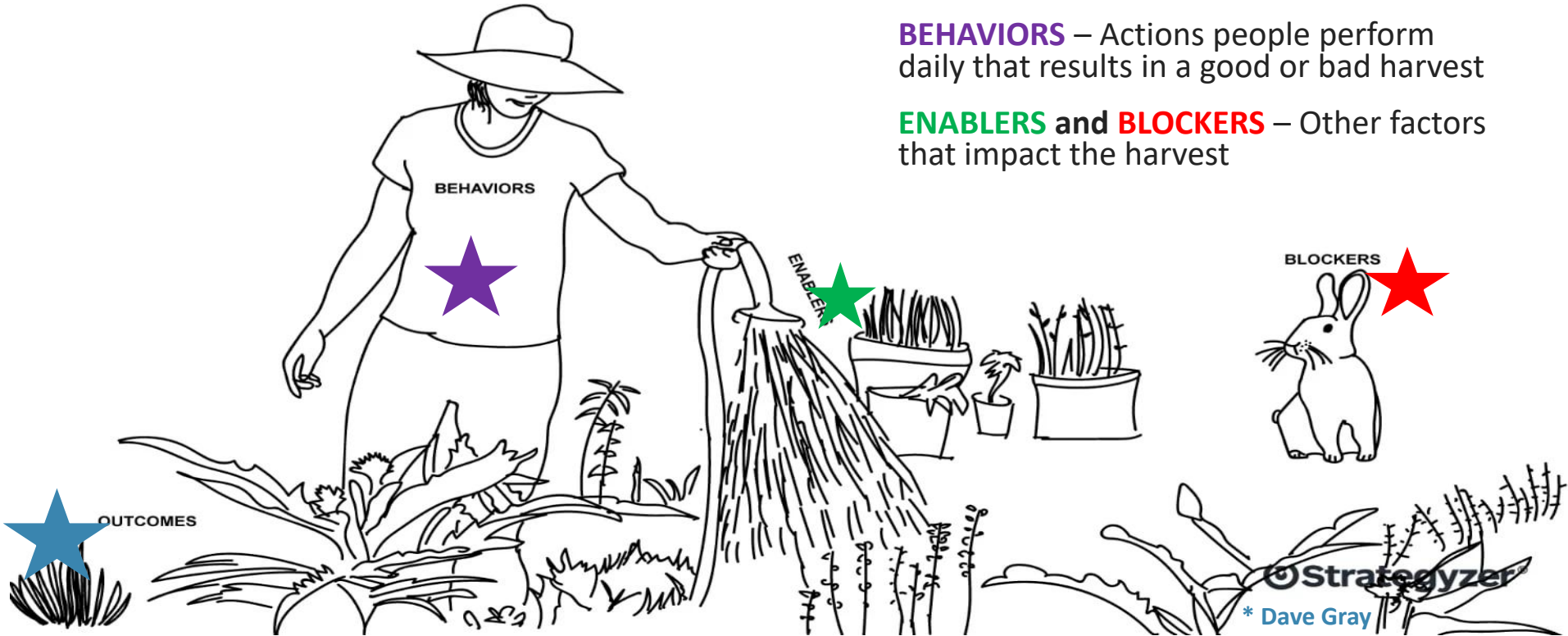


Imagine Your Corporate Culture as a Garden*

OUTCOMES – The “harvest”

BEHAVIORS – Actions people perform daily that results in a good or bad harvest

ENABLERS and **BLOCKERS** – Other factors that impact the harvest



Six Steps to Creating a CI-Supportive Culture



1
Have at least one
C-suite champion

2
Educate people on
the services your
team provides

3
Brand and internally
market your
MI/CI unit

4
Express how AI
amplifies CI;
humans interpret

5
Encourage and
recognize staff
contributions

6
Regularly share CI
success stories
and impact



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It's Not Enough to Do Great Work.

You Must Proactively Defend It!



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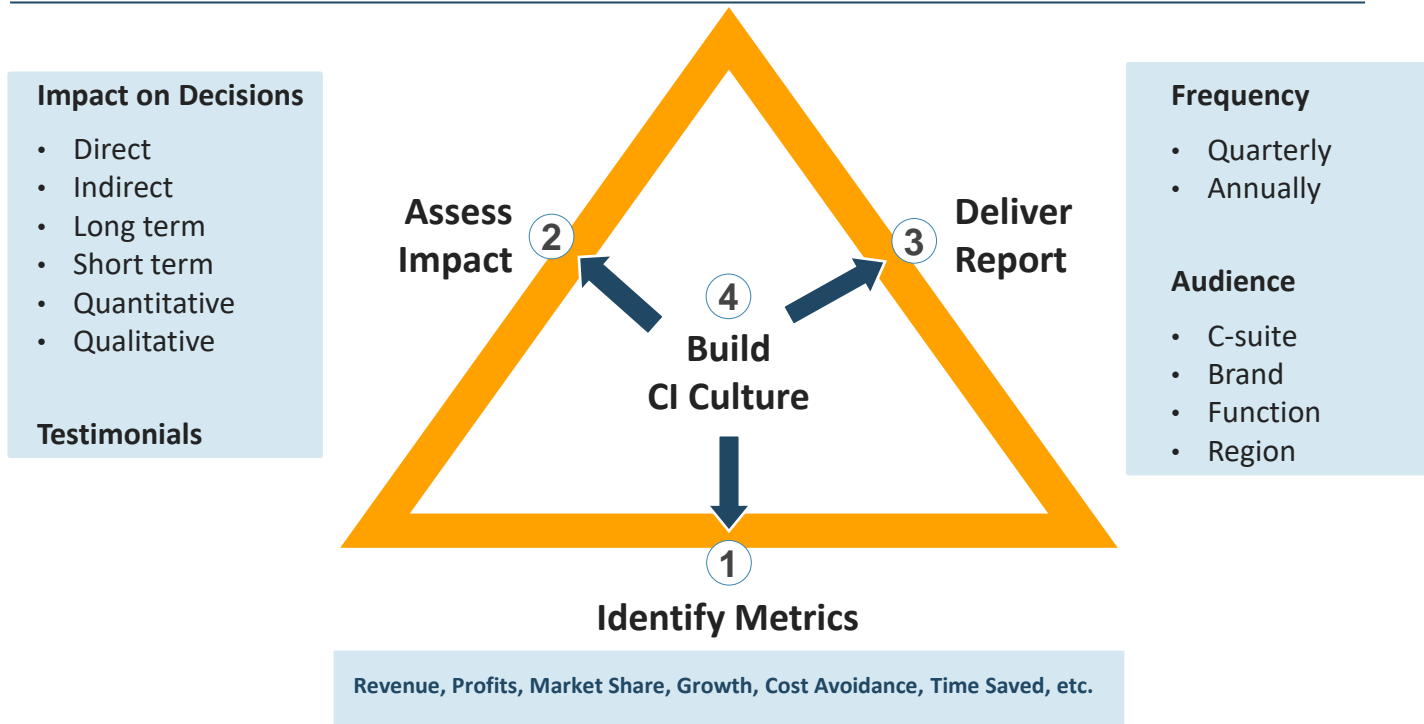
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ROCI®: A Framework for Return on Competitive Intelligence

Obtain input from stakeholders throughout the intelligence process on perceived value of deliverables



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“ROCI[®] offers a practical, flexible, user-oriented way of engaging both CI users and producers in evaluating CI’s value throughout the intelligence cycle.”

- Jan Herring



5 Key Areas Where Humans Remain Essential to Competitive Intelligence

Contextual
Judgement &
Prioritization

Unstructured
Primary Intelligence
Interviewing

Interpretation of
Ambiguity and
Contradictions

Influencing
Decision Makers

Ethical, Strategic,
and Cultural
Filtering



Rallying Cry: SIR's Theme - "Curiosity at the Core"

Curiosity at the core isn't just about finding new insights.

It's about proving how those insights matter.

Insights without impact is invisible!

Leadership doesn't reward effort, they reward outcomes they can see, feel, and trust.

You're not competing with AI, but the *perception* of what AI can do.

Measure it. Communicate it. Own it!





Your insights aren't just valuable—they're irreplaceable. But only if you prove it, ***consistently and loudly***.

Final Thoughts

What are you going to start to measure next quarter to make your value as a human ***unignorable***?!



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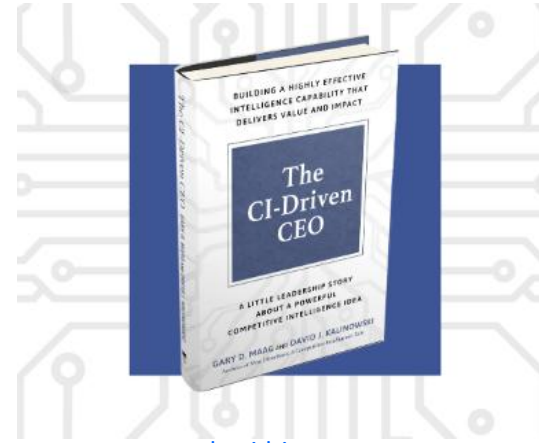
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10 N. Martingale Road
Suite 400
Schaumburg, IL 60173
Ph: 847.483.9300



www.proactiveworldwide.com



www.thecidrivenceo.com



David Kalinowski

President & Co-Founder

davidk@proactiveworldwide.com



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