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WHO ARE YOUR CLIENTS?

SETTING THE STAGE

The importance of pausing at the start of a job or a project to identify explicitly the primary recipient of your analysis cannot be overstated. When preparing a briefing, the answer to the question, “Who are your clients?” is usually obvious, although you may need to target your presentation to a larger group with several subsets of clients, interests, and desired outcomes.¹ When writing a product, however, this step is often overlooked—and the cost to analysts and their organizations can be substantial.²

The *raison d’être* for analysts and analytic organizations is to bring a broad range of information to bear on difficult questions, select that which is most significant, then tailor and package it for decision makers. These functions are similar for analysts whether they work in national security, homeland security, law enforcement, or private industry.

Most clients, however, have much more on their minds than absorbing the details and historic data in which analysts are immersed. Successful analysts translate their expertise into forms that “sing” to busy clients and respond to their needs and interests without them having to ask. The first step is to understand the clients’ responsibilities, problems, pressures, and preferences as receivers of information. This is often best accomplished by establishing a working relationship with the client that allows for more informal interaction and feedback.

LOOKING MORE DEEPLY

As you begin a new job and read to familiarize yourself with the subject matter, make a list or draw a diagram of those who are interested in or will be counting on your analysis to help them carry out their responsibilities. This client base will guide the questions you formulate, the information you seek and monitor, and the products you generate. Most of your analyses should be targeted at a specific client, but you may prepare reports intended for large audiences interested in your organization’s authoritative judgment. The more specific you can be in defining the individuals or positions you support, the better. Be sure to include those in your chain of command as well as those outside your organization who receive your products.

As a working-level analyst, you probably know something about your clients from the media, have learned about them from colleagues, or have met or briefed some of them in person. Ideally, you have established a process that allows you to engage with them in person or electronically to identify their most pressing needs, better scope their requirements, and obtain feedback on the value of the analysis you have provided.

When beginning a project, make every effort to visualize those for whom you are preparing your briefing or paper and what they will be doing as a result of your analytic conclusions. The one thing they most likely have in common is insufficient time for processing and absorbing all the data they need to make effective decisions. They are counting on you to do some of the thinking and anticipating for them, giving them insights so they can “grab it and go.”

Understanding Busy Clients

The more senior your clients, the broader their scope of responsibilities and the less time they will have to read your analysis. Senior clients share several characteristics that you should take into consideration in your products and other support.

- *Their time is limited and precious.* Senior clients might be given a hundred pages of information to read each morning. You should expect them to move quickly through volumes, keying off words that catch their attention and interest. Your products should be focused and easily digestible with a prominent “So What” that points the clients to the implications and options for decisions they will make.
- *They depend on you to prioritize what is important.* Your selection of topics helps clients manage their time and focus their intellectual energies on what is most critical. The human brain, however, can follow only a limited number of topics at any given time. Do not assume your clients read or remember previous products. A good strategy is to insert simple graphics or provide supporting or explanatory data in a separate text box.
- *They expect transparency in your facts and your analysis.* Source Summaries and the rationale behind why you know what you know and how you came to your conclusions create the backdrop for your clients’ acceptance or rejection of your work. The need for such transparency is even more important if you expect your clients will disagree with your analysis. Some clients will simply disregard your hard work, but others may stop to rethink the issue. If you do not present clear argumentation, however, you may never know if you missed the opportunity to change their thinking or inform their knowledge base.
- *They “use” information from “trusted” analysts and organizations.* Your organization’s “brand name” can determine the weight your clients give to your products. Just like we develop preferences for credible service providers, information sources, and commercial products, clients pay more attention to the producers they believe are more thoughtful, reliable, and accurate.
- *You are only one source of their information flow.* Busy executives—from generals to cabinet officials to chief executive officers—have multiple sources of information, many of whom may be closer to the issue than you are. Never assume you are the only or even the most knowledgeable source; know what you have that is different from the others.

Preparing Yourself to Serve Busy Clients

Whether you are an intelligence analyst at the Defense Intelligence Agency, the Chicago Police Department, Citibank, or Walmart, you have prepared yourself for an analytic position by at least earning academic credentials and probably building perspective through developmental experiences, such as military service, government or industry internships, or foreign study. These are the essential foundations to help you get the opportunity to demonstrate and develop your analytic “chops,” but you also need to be aware of the internal, cognitive characteristics that will help you successfully serve your organization and your clients.

Mindfulness. In recent years the practice of mindfulness has become a growing movement in institutions ranging from universities to prisons, but self-awareness and the ability to distinguish one’s personal experience from observation of the external world has long been a hallmark of the best analysts. This awareness—attention and acceptance—of our thoughts and feelings, without placing a value of rightness or wrongness on them, is fundamental to freeing our minds both to observe what is actually happening in the situation we are analyzing and to weigh the alternatives and possibilities that can explain the past, present, and future.

The popularity of this integration of Zen Buddhist teaching with scientific findings stems from University of Massachusetts medical professor Jon Kabat-Zinn’s design of programs to reduce stress, anxiety, and pain, but has strong application in professional as well as personal life. As one of our academic colleagues writes, “we must be aware of ourselves just as much as we need to be aware of our subject matter, our audience, and the purpose of our analysis.”³

Kabat-Zinn in a recent presentation⁴ noted that “moment-to-moment nonjudgmental awareness is hard to attain but is key to being open.” He explained that this entails “holding judgment at bay while envisioning the problem and possibilities, before fitting known information into the frame” (see Chapter 3 for Gary Klein’s data/frame concept of “sensemaking”). The practice of mindfulness brings a discipline to the starting point in much the same way as the practice of Structured Analytic Techniques does throughout the critical thinking process. In mindfulness terminology, this “beginner’s mind” helps overcome “minds that are so full of expertise” that they leave “little room for novelty or freshness” (see Chapter 12 for Rob Johnston’s model for building analytic expertise).

This means that we will cultivate discernment, the capacity to see what is unfolding, to understand it with clarity, wisdom, understanding the interconnections between things, noticing the tendency to recognize judgment and recognize that it creates a veil or filter in front of our eyes . . . that is practically blinding to us.

—Jon Kabat-Zinn

“The Dharma Foundations of Mindfulness in the Mainstream:
The Art and the Science of MBSR and Other Mindfulness-Based
Programs”⁵

The goal of “not judging the judging” is to balance our thinking and the brain’s natural tendency to come to Premature Closure, forming opinions that are often bipolar—“this” or “that,” “good” or “bad.” Kabat-Zinn advocates developing the mindfulness disciplines through guided meditation and practice of seven foundational attitudes, several of which you will see reflected in the discussions of analytic skills development throughout this book:

1. *Non-judging*. Recognizing judgments so you can assess them more clearly.
2. *Patience*. Appreciating the present moment, understanding that things unfold in their own time.
3. *Beginner’s mind*. Seeing the world through fresh eyes, opening the door to creativity and clarity.
4. *Trust*. Consciously assessing the degree to which we can trust what we see, think, and perceive.
5. *Non-striving*. Recognizing that goals can be achieved by backing off and focusing on the present.
6. *Acceptance*. Willingly seeing and coming to terms with things the way they really are.
7. *Letting go*. Letting things be the way they really are.⁶

Trust. Mindfulness refers to the idea of “trust” in terms of how you trust yourself and your thinking, but trust also refers to whether and how much your clients trust and therefore depend on and use your analysis. Stephen Covey⁷ lays out a mental model with five “waves” of trust ranging through self, relationships, organization, market, and society that he likens to concentric ripples in water because “trust always flows from the inside-out.”

All the waves provide context for the role and impact of analytic products, but analysts need to focus primarily on the first two. The extensive literature on trust provides a variety of ways to categorize the components of trust; for our purposes, the simplest way is to think of trust as a function of capability and credibility.

- *Capability* means that you have developed the knowledge, skills, and abilities (see Chapter 3 for a discussion of analytic competencies) to add value in your assessment of the issues for which you are responsible. It is measured based on your track record of products, judgments, and assessments and their utility to your clients.
- *Credibility* is built based on that track record, but also by your clients’ perception of your honesty, integrity, and intent. Do you do what you say you will do in serving your clients? Do you or your products have a bias or hidden agenda that diminishes their overall value and utility?

Covey identifies thirteen behaviors associated with “high-trust leaders” that apply equally to professional analysts and rest on the foundation of consistent action.

In today's polarized environment (see Chapter 14 on politicization), where analysts can be attacked as they try to do their jobs, these behaviors may be challenging to exhibit but are the only way to bridge differences and attempt to establish a common focus on the potential meanings of observable data.

- Talk straight
- Show respect
- Be transparent
- Right wrongs
- Show loyalty
- Deliver results
- Get better
- Confront reality
- State expectations
- Be accountable
- Listen first
- Meet commitments
- Extend trust⁸

The good news is that research on trust indicates that humans are physically hard-wired to trust others. Malcolm Gladwell in his most recent book, *Talking to Strangers*,⁹ writes that we naturally default to believing another person is telling the truth because the benefits of trust usually outweigh the risks of being burned. To avoid negative consequences, he advocates exercising mindfulness and several of the traits that should be commonplace in analysts—careful listening, not reading too much into words or gestures of those who might be deceptive, and never rushing to judgment (see Chapter 9 for a further discussion of Gladwell's writing on how this bias impacts our ability to detect deception).

The bad news for analysts, however, is that other research¹⁰ suggests that the more status, power, and wealth individuals have, the less they trust others and the less trustworthy they are. Analysts should strive to build trust with clients, but they should expect that their efforts will not always meet with success. This is why analysts need to be particularly adept at assessing client needs and priorities that will at least demonstrate credibility through their professional tradecraft.

A Growth Mindset. Previous discussions make clear that our analytic workspace is not set in stone—it changes and we must develop the skills and mindset to grow with it. While one of our colleagues famously said that “good analysts are born and not made,” we believe that each of us can improve the analytic skills and predilections with which we were born. Psychologist Carol Dweck¹¹ helps us understand that our mindset makes a critical difference in whether or not we believe we can change our abilities and grow. People with a *growth mindset* believe they can develop expertise in anything if they just work hard enough as opposed to those with a *fixed mindset*, who are convinced that their natural abilities are all they have (see Figure 1.1). At the extremes of these mindsets, the former pass through life learning new skills, evolving relationships, and continually developing, while the latter are continually trying to prove themselves and get stuck when they fail, avoiding accountability and blaming others. These mindsets

FIGURE 1.1 ■ Comparing Fixed and Growth Mindsets

Fixed Mindset	Growth Mindset
Seeks validation	Seeks development
Sees failures as disasters	Sees failures as opportunities
Avoids challenges	Relishes challenges

appear as soon as children begin to evaluate themselves—one of Dweck’s experiments was with four-year-olds—with those demonstrating fixed mindsets being reluctant to take on challenges and afraid of not looking smart.

Analysis demands mental stretching to keep pace with the clients you are serving, the world you are interpreting, and the tools with which you are working. According to Dweck, if you believe you can develop yourself, you are more likely to seek accurate information because you are looking for ways to improve and impact your performance and environment. She notes that you can learn to adopt a growth mindset.

Influence. Analysis without impact wastes both analyst effort and organizational resources so it is natural and expected that analysts should seek to understand what they can do to maximize the influence or effect that their analysis has on their clients’ thinking and actions. Babson professor Allan Cohen and Stanford business professor David Bradford’s model for “influence without authority”¹² was devised for the business world but has strong applicability to building the analyst–client relationship. They contend that influence is based on exchange—in this case, technically competent analysts provide intelligence assessments that help their clients succeed at their jobs. In return, analysts receive feedback—whether directly or indirectly from clients or their chain of command—that informs and enhances their ability to succeed at their analytic tasks.

Cohen and Bradford’s six-step model for gaining influence underscores the critical importance not only of knowing your client but understanding the value of what you provide and how you can maximize your impact.

1. Consider everyone as a potential friend and ally.
2. Clearly identify and define your objectives and priorities.
3. See the world through the eyes of those you seek to influence.
4. Find out what other people value, and what you can offer in exchange. Know also precisely what you value and will accept.
5. Understand your relationship with those you want to influence, and understand what kind of relationship they want.
6. Exercise influence through a process of mutual exchange and mutual benefit.¹³

Cohen and Bradford encourage developing strategies to respond to clients' needs, but warn of several pitfalls, including the following:

- Failure to plan ahead, accurately gauging what the client really needs, or accounting for changes in situations or priorities
- Attachment to your own assessments, even in the face of change
- Overplaying what you can deliver or the significance of your information
- Diffidence in offering information or services that might be of value for fear they will not be accepted¹⁴

Empathy. The most valuable analysts are able to view issues from their clients' perspectives, empathetically "seeing the world through others' eyes." Excellent salespeople or managers are empathetic because they recognize and respond to the needs of clients, or subordinates. They are easy to approach and probably approach you first with interest in your wants and needs. They "get it right," making you feel they understand you even if they do not have the color shirt you want or are unable to accommodate a request to shift time schedules. Empathy is at the core of successful social interactions, facilitating communication, trust, and cooperation.

How do you know if you are empathetic? Psychologists have entire workshops on assessing and developing capacities for empathy, but here is the shorthand answer: empathetic people may more accurately sense how they are perceived by others because they intuit another's perception of them and adjust their behaviors so they are seen in ways they want to be seen. The interconnection of this concept with mindfulness, trust, growth mindset, and influence provides analysts with more food for thought on consciously planning how they can develop their capacity to understand their client.

Empathy has both cognitive and emotional components, the latter of which Yale psychologist Paul Bloom¹⁵ notes limits its usefulness and can lead to the dangerous reinforcement of biases. "Cognitive empathy" allows for the understanding of another's circumstances without having to actually emotionally "feel their pain." For instance, doctors should rationally care about their patients, but should not become emotionally empathetic. Bloom advocates a "rational compassion" that brings an aware, reflective attitude of affiliation that holds out for skeptical consideration of knee-jerk or biased reactions (see Figure 1.2).

A growing amount of research over the past few years indicates that empathy might even create boundaries by hardening our ability to see all sides of an issue or situation. Scholars hypothesize that the strength of empathizing with one side—which may be attractive or similar to the empathizer—may actually create antipathy toward the "out side." The fear is that empathy could be "tearing us apart."¹⁶ One recently published study¹⁷ showed that those who scored high on an empathy scale also had higher levels of "affective polarization"—the difference between the rating they gave their political party as opposed to the opposing party—and were more prone to *schadenfreude*, or taking pleasure at the other side's misfortune.

FIGURE 1.2 ■ “Rational Compassion”: Empathizing With Your Clients and Coworkers

Here are some steps you can take to build empathy with your work colleagues and clients:

- **Listen actively.** If we focus on clarifying what we see or believe is needed rather than judging, then we can move more quickly toward broadly applicable solutions. Active listening implies we are paying attention to others and can repeat, paraphrase using similar words, or reflect on what we have heard using our own words to express key messages.
- **Take personal responsibility for improvement.** Those who are “stress hardy” exhibit three characteristics:
 1. Commitment (rather than alienation) that gives passion and purpose to their lives
 2. Perception of challenges as opportunities
 3. Willingness to devote time and energy to situations over which they have some control or influence
- **Ask clear, forward-looking questions about things that matter.** Try to define the problem or issue with the following questions:
 1. Address a specific need, containing the actionable “So What.” What will someone do with your solution and what is the impact?
 2. Include the specifics of the issue: Who, What, How, When, Where, and Why. Think about the difference between process and substance in your solutions: Will things be better by doing them in a different way, by looking at the problem differently based on the data, or both?
 3. Fit into one sentence. Can you capture the bottom line in a simple, crisp sentence?
 4. Have an answer, at least theoretically, or options. The best questions are puzzles and not mysteries. For example, what I had for breakfast this morning is a puzzle that someone else can figure out. It happened; there are clues. What I will have for breakfast a week from now is a mystery because even I don’t know. Do you need to consider or present alternative explanations?
- **Track and collect accurate data.** Ensure that you have good sources for your data. Read the speeches or statements from leaders within your organization or that relate to your problems; be familiar with the laws, regulations, and policies that underlie your organization’s operations; and pay attention to the surveys, assessments, and reports that provide the data that can strengthen your arguments.

Source: Suzanne Kobasa, Salvatore R. Maddi, and Stephen Kahn, “Hardiness and Health: A Prospective Study,” *Journal of Personality and Social Psychology* 42 [January 1982]: 168–177.

Assessing Client Needs

The best technique for gauging your clients’ needs is to put yourself in their shoes through Red Hat Analysis,¹⁸ focusing on their responsibilities and interests. The more

you internalize their priorities, burdens, and goals, the better you can discern the questions they need addressed and target your analytic responses. The following questions can help guide your assessment:

1. *What is their role?* Your clients' responsibilities are the most important input to determining the analytic products that will help them do their jobs. Do they deal with specific issues or geographic areas? What kind of analysis are they looking for—a compendium of facts, an evaluation of developments, or a projection of future trends? Who do they report to, what decisions must they make, and who do they serve? In Washington, for example, senior government officials respond to their cabinet secretary, the White House, Congress, and the media. In corporations, executives may have to respond to stockholders or product consumers as well as to their own chain of command.
2. *What are their interests?* Be alert for hints about client interests in all your interactions, meetings, and readings. Are they seeking specific data that support their current policies or asking you to help frame the problem for them? If you are fortunate to have firsthand contact with your clients, they may tell you about their interests. More likely, you will have to figure it out by reaching out to their staff, briefers, or your chain of command. You can learn a lot by reading press reports, congressional testimony, websites, and other source and analytic reports. Once you know the decision-maker's interest, you can determine why the issue is important; whether the issue is an opportunity, threat, or decision point; and how best to shape your response.

"Twenty-first century analysts will need to become less independent and neutral in favor of greater tailoring to customer needs."

—Carmen Medina

"What to Do When Traditional Models Fail: The Coming Revolution in Intelligence Analysis"¹⁹

Calendars are an excellent source of information about what is driving clients' immediate concerns. Are they preparing for a meeting or trip or for negotiations rather than just following an issue? How does your analysis affect those preparations?

Your analysis should focus on clients' core interests while addressing other concerns in the broader context. Some argue that analysts' focus should be on the specific, hard questions of their primary clients rather than on simply tracking developments on their account. This means analysts would start their days by reviewing feedback and tasking from clients rather than first reading the morning traffic.²⁰

3. *What is their expertise?* Understanding the depth of clients' knowledge of the topic is critical in crafting analytic responses. This level of knowledge

will determine whether terms need definition, how much evidence is needed to support claims and judgments, whether historical details should be included, and how much context is necessary. For example, clients who are already experts in their fields require only quick turnaround information about a new development. In these instances, analysts need to focus on how they can best add value in an era of information abundance. Other clients are generalists who will need more context and often a full introduction to an unfamiliar topic.

In some cases, your clients may have firsthand knowledge of a situation or a personality that varies from what you portray in your analysis. You should expect probing questions and disagreements from your most knowledgeable clients. Prepare for this by ensuring that your sources and judgments are carefully selected and accurately portrayed (see Chapter 6 for dealing with analytic disagreements).

In both situations, informing the policymaker or decision maker about unknowns, uncertainties, and contradictory information is essential to meeting the client's needs. As Carmen Medina, a former deputy director for intelligence at the Central Intelligence Agency (CIA), noted, "The analysts' real value increasingly will lie in identifying discontinuities that shatter precedents and trends."²¹ Moreover, client needs and preferences change rapidly, as does the environment in which analysis operates, requiring analysts to constantly reassess how best they can respond to clients' needs.

4. *How do they absorb information?* The President's Daily Brief, produced by the Director of National Intelligence, for example, changes with each president to reflect the chief executive's information-processing preferences, tolerance for detail, and interest in intelligence. Does the client prefer to receive information written or orally? Should the product be short or long, in paragraphs or bullets, with few or many graphics, delivered in hard copy, on a tablet, or as an infographic?

5. *What is the interaction with your organization?* Did the client ask a question? Are you trying to educate, convince, or alert? Is there an action to be taken or options to be considered? Intelligence analysts in national security do not formulate or recommend policy but should be aware of circumstances in which they can alert their clients to opportunities for beneficial action or avoidance of danger.

Analysts should always seek to know the circumstance for a request, even if they do not get a clear response in return. It helps to know if the client is responding to a crisis, a strategic challenge, or an ongoing issue. Are requesters seeking to learn more about a new situation, or are they already well informed and just checking to ensure they have full command of the most recent facts and analysis before making a decision?

If you are concerned that the question you have been given is poorly formulated or just plain wrong, seek clarification before drafting your response. Often a question

will be reinterpreted or revised multiple times as it moves down the chain of command. Try to reach back to the initial source—preferably directly or through institutional channels if necessary—to seek clarification. Answering the wrong question is a waste of everyone’s time.

6. *What other sources of information do they consult?* Do the clients read specific publications or watch certain news channels? To which blogs or news feeds do they subscribe? Do they have experts in your field on their staff who filter or explain your analysis for them? This is a particular challenge for analysts who write on technical topics; your clients may rely on others to interpret your material rather than reading it themselves.

Do you have concerns about the sensitivity of your information and how it might be used? Could that have an impact on your analysis or use of sources?

7. *What will your client do with your information and insights?* The actions that will be taken based on your work help determine the questions you will answer, the level of detail you will include, and the frequency or turnaround for your products. Imagine what reactions you would have if you were in the client’s job receiving your analysis and consider what actions you might take. You can categorize these projected actions along a set of dimensions, such as *inaction to action*, *indirect to direct*, or *positive to negative*, to develop a second sense for the potential impact your analysis might have. Your understanding of the broader context within which you perform your analysis (see Chapter 3) will improve your ability to empathize with your clients and craft products that respond to their needs.

Do not get swept away in the quest for the perfect prediction; we are convinced this is an exercise in futility. The principal goal of analysis is to properly frame the problem, accept that multiple outcomes are possible, and help the decision maker better understand the underlying forces, factors, or key drivers that are most likely to shape the final outcome. Only if policymakers and decision makers are armed with that knowledge can they perform their roles effectively.

Figure 1.3 provides a simple client checklist analysts can use to ensure that they have considered all aspects of a client’s needs. The checklist also helps focus attention on what matters most and to generate a rigorous response to the task at hand.

8. *Can you bound the problem to tell clients what they do not need to worry about?* Analysts often ignore the strategy of focusing clients on what is most important by telling them what is *not* important. Busy people value being told what issues will not require their attention. Some of the most positive feedback the authors received from senior policymakers at the cabinet and subcabinet levels came when we provided analysis on why a government was unlikely to fall or a particular situation was unlikely to devolve into a crisis.

FIGURE 1.3 ■ Knowing Your Client Checklist

The following questions will help you explore how best to serve your ultimate client:

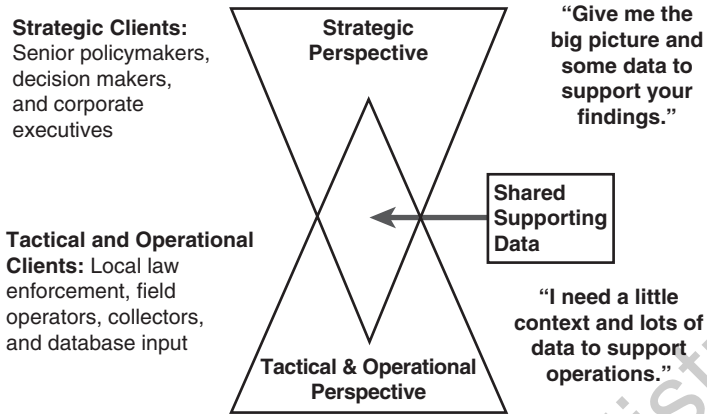
1. Who is the key person for whom the product is being developed?
2. Will this product answer the question the client asked? Did the client ask the right question or is it more important to place your answer in a broader context?
3. What is the most important message to give this client? What value-added contribution can you make?
4. How is the client expected to use this information?
5. How much time does the client have to digest your product?
6. What format would convey the information most effectively?
7. Is it possible to capture the essence of your message in one or a few key graphics?
8. What is the client's level of tolerance for technical language and detail? Can you provide details in backup materials, graphics, or an annex?
9. Does distribution of this document need to be restricted? What classification or handling caveats are most appropriate? Should you prepare different products at different levels of restriction?
10. Would the client expect you to reach out to other experts for assistance in answering this question? If so, how would you flag their contribution in presenting your product?
11. To whom might the client turn for other views on this topic? What data or analysis might others provide that could influence how the client will react to what you are preparing?
12. What perspectives do other interested parties have on this issue? What are the responsibilities of the other parties?

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Identifying Key Clients

When starting to work on a specific project, list your principal client and what he or she might do as a result of reading your analysis. This will start you on the right foot by establishing a clear focus up front and enabling detailed discussions about your analytic plan of attack with your supervisors, reviewers, and mentors.

In some cases, your analysis will be geared toward serving a variety of clients. At the Department of Homeland Security, for example, analysts usually have to address the needs of several very different clients—the secretary of Homeland Security, state and local law enforcement officials, private industry, and their Intelligence Community counterparts. A single document sent to a senior decision maker who is looking for strategic perspective but also to a local law enforcement body that requires tactical information to perform its mission would end up frustrating both clients as each would receive substantial information of little value to them (see Figure 1.4). In these circumstances, analysts should consider drafting two or more distinct products tailored to the specific needs of each client or customer set.

FIGURE 1.4 ■ Tailoring Products to Best Serve Clients

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In general, researching, drafting, and sourcing different products for each client or customer set can be accomplished most efficiently as a parallel process. Simultaneous production of tailored products helps the author address the specific—and sometimes unique—needs of each client and helps ensure that each client receives the information that is of greatest value to him or her.

Expectations for Feedback

Busy clients are consumed with responding to multiple demands on their time and are focused on their problems rather than on providing feedback to their analytic support. Many analytic organizations structure themselves to solicit and receive feedback from readers of assessments and periodic publications. But analysts rarely get as much feedback as they would like, particularly from their most senior clients. Formal surveys that seek periodic, written feedback have rarely proved to be effective and reliance on an interviewing process can be overly time-consuming. Two mechanisms that offer more promise are for the analyst to attend regularly scheduled staff meetings hosted by the client or to arrange for periodic briefings of the client. In some circumstances, an informal dialogue can be pursued over email, but in-person contact almost always ensures more effective communication while building trust.

We urge analysts to keep in mind that our brains are wired to overestimate the impact of our analysis on others and for decision makers to underestimate the value of analytic support of their decision processes. Be thrilled when you get a compliment and pleased when you have evidence your analyses have been read. If you put yourselves in your busy clients' shoes, you will understand why their feedback can be sporadic and sparse. Your objective should be to provide analysis of sufficient value that your clients keep coming back asking for more.

KEY TAKEAWAYS

- When starting work on a new issue or account, analysts should take a moment to identify the client base and how the various users will apply and benefit from the analysis.
- These few minutes of reflection will result in a more focused product that will move more quickly through the editing and coordination processes.
- Busy clients have limited time to read analysis, are dependent on analytic products to help focus their attention on what is important, and expect transparency in facts and sourcing.
- Analysts can build empathy by understanding their clients' roles, interests, expertise, information processing, and predilection for action.
- The goal of analysis is to properly frame the problem, accept that multiple outcomes are possible, and help the decision maker better understand the underlying forces, factors, or key drivers that are most likely to shape the final outcome.
- Analysts should look for ways to tell clients what is not important and what they do not need to worry about.
- Specific projects should be directed to a principal client. If analysts need to support a varied client set on the same issue, they should consider simultaneous researching, drafting, and sourcing of parallel products tailored to each client or customer set.
- Analysts should explore ways to establish periodic contact with key clients to obtain effective informal feedback.

CONSIDERING THE CASE STUDY

Review Case Study I, “Uncharted Territory: Conflict, Competition, or Collaboration in the Arctic?”

- Do anticipated developments in the Arctic pose a serious threat—or offer significant opportunities—to the international community? To the organization that you work for?
 - Who would you consider the principal client or clients in preparing a report on the future of the Arctic?
1. What would be the most important issues for senior policymakers to consider?
 2. What would be the most important issues for senior defense planners to consider?
- Should the issue be posed as a threat, an opportunity, a key decision point, or some combination of these?
 - Are there critical unknowns, uncertainties, or contradictory information that should be highlighted?

NOTES

1. Throughout this chapter—and this book—we have opted for the term *client* as opposed to *customer*. *Client* infers an established relationship and some degree of interaction between the producer and consumer of the analysis. *Customer* commonly describes those who simply receive products and have

- little interaction with the producer. *Client* is a more appropriate term for a service-based industry and *customer* for a manufacturing-based culture. We firmly believe that analytic support entities are most successful when they are client centered and service oriented.
2. The information used in this chapter is adapted from Pherson Associates training materials (www.pherson.org).
 3. Email exchange with Jorhena Thomas, May 3, 2019.
 4. Jon Kabat-Zinn, "The Dharma Foundations of Mindfulness in the Mainstream: The Art and the Science of MBSR and Other Mindfulness-Based Programs" (presentation at Mahachulalongkornrajavidyalaya University, Bangkok, Thailand, May 14, 2019), <https://www.youtube.com/watch?v=NH1K2BSQw9o>.
 5. Kabat-Zinn, "The Dharma Foundations of Mindfulness."
 6. Jon Kabat-Zinn, *Full Catastrophe Living: Using the Wisdom of Your Body and Mind to Face Stress, Pain, and Illness*, rev. ed. (New York: Bantam Books, 2013).
 7. Stephen Covey, *The Speed of Trust: The One Thing That Changes Everything* (New York: Simon & Shuster, 2006).
 8. Covey, *The Speed of Trust*.
 9. Malcolm Gladwell, *Talking to Strangers* (New York: Little, Brown, 2019).
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