1. **Have perspective.**
   Apple shares its financial balance sheet, plus a lot of other info about its general practices, because it’s required to by law as a public company. If you were the CEO though, would you share how many new model iPhones you sold by region, especially if Samsung could use that to its advantage? How much financial or trade secret info would you share if your company was private?

   Companies rarely make the effort to disclose competitive info including: target markets, unit sales, cost markups, organizational charts, business models, supply chains etc., unless it gives them a strategic advantage. Public companies need only report what’s *materially important* to investors, and that’s *murky*. Save time by considering if it’s reasonable to think companies would share the info you want.

2. **Know the NAICS.**
   OK- hang in there- this might get dense. *Myrmecophaga tridactyla* is the scientific name of an animal that some call an ‘ant bear’ and others call a ‘giant anteater.’ Scientific names are a standardized controlled vocabulary- a taxonomy- to help people avoid confusion about what animal they’re discussing.

   Business gets confusing too- What is ‘clean tech’ or ‘plastics manufacturing’ or ‘consulting’? Code systems help solve that- but alas- they are *not perfect*.

   **NAICS = North American Industry Classification System.** (It rhymes with *cakes*). Companies offering similar products or services are grouped by code. For a list of companies in X industry, find the NAICS code that best fits the industry. You can use NAICS codes as search criteria in many business databases.

3. **Get technical.**
   When searching for **NAICS** codes, do different searches for synonyms: *aircraft* and *airplane*, *cardiac* and *heart*. Also avoid buzzwords- use *solar* instead of *green* or *watch* instead of *wearable*.

4. **Avoid sentences.**
   Unlike Google, article databases (such as Business Source Complete) are literal with results. Google may return a zillion results if you type a long string of words-, aka *google sentences*- but those results might be irrelevant to your query. In an article database, the words you typed in a search box must be in the results.

   So **fewer keywords = more results**. First search a database with only 1-2 words. Then add more to narrow your topic.

5. **Be lazy.**
   When keyword searching, the asterisk* finds every ending to the root of a word, so *market* finds: *market, markets, marketing, marketed*, etc., making for a efficient and broad search. Why type out every version of a word when the asterisk does the work for you?
6. Be precise.
When keyword searching, quotes find words in an exact phrase like "improving employee morale". Be careful! This is a very focused search, because the words must be in that exact sequence. If you get no results with one phrase, try a broadening it: "employee morale" AND improv*.

7. Make assumptions.
Can’t find info on a private company? Investigate a public one in the same industry as a proxy (a substitute). Can’t find info on a new market, e.g. transceivers in orthodontics so you hear the radio with your braces? Then study the general orthodontic or music industries for trends. Can’t find info on consumers in the nation of Chile? Then examine a larger culturally similar neighbor, Argentina.

In short, you become the analyst by making educated assumptions based on all of the credible info available. When you make assumptions, explain your logic and give citations.

8. Go Beyond.
Found a great report? That’s excellent, but don’t stop yet. Get more info to corroborate it so your research and deliverable(s) will be stronger. And don’t give up if your first few attempts to find something are unsuccessful. Filtering through the vast amount of info available in the digital age is a huge challenge! (This is also why you have professional librarians as guides...)

9. Do detective work.
You need a cake. You go to a grocery store and get a pre-packaged, two-layer, chocolate cake, with yellow frosting. That’s secondary research; someone else worked to produce and package the info. Is it easy and fast? Yes. Is it customized? Nope.

What if that grocery store's cake doesn't meets your needs? What if you need a three-layer, vanilla/chocolate/strawberry cake, with a fruit filling and white frosting? You must work to make the cake from scratch. Gathering and analyzing info 'from scratch' is primary research.

Want salaries in X industry? Examine several job postings to get a range. Need the latest trends or a particular statistic in X industry? Find the professional or trade associations and make contact to talk-shop with other players. Just don’t get carried away and act unethically. Curious about whether your potential consumers want your product/service? Set up a survey, focus group, or series of interviews. The library has helpful guidebooks for conducting primary research.

10. Advance your Googling.
Google is helpful for finding things that people have posted without formally publishing, including: reports, presentation slides, brochures, etc. which wouldn’t normally live in a database of published articles. Find them by adding filetype:format to a search

- Sample search: autonomous cars market filetype:pdf
- Works with ppt/pptx/xls/xlsx, etc.

Google also limits results to a domain type when you add site: suffix to a search.

- Sample search: minimum wage increase site:.org
- .org → nonprofits and organizations, .gov → US government sites, .int → intergovernmental organizations, .cn → sites from China (each country has its own domain).