

Introduction to Strategic Corporate Research

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1. Strategic Corporate Research
2. Sources of Information
3. The Corporate Campaign
4. Key Questions

What is Strategic Corporate Research

A way for unions...

- To understand key employers & industries
- To plan comprehensive campaigns involving strategic research, community outreach, and worker mobilization
- To use creative tactics
- GOAL - To increase worker power

Strategic Corporate Research

- We want to look at a corporation from the the boss's perspective – what are the **employer's strategic relationships** that allow the business to exist and profit?
- Once identified, we work to affect those strategic relationships to change the employer's behavior.

Why is all of this necessary

- The companies are, and will continue, to develop new strategies to attack the working class.
- Our current methods that work today may not work tomorrow.
- There are myriad laws and regulations (labor and non-labor) affecting employers that can be used to our advantage.
- Use the capitalist's system against the capitalists.

The 4 Steps of Strategic Research: (MODIFY)

First Cut – Answers basic questions about the company - provides focus for further research.

Corporate Profile – Comprehensive examination of company - the identification of key issues, relationships, business strategy.

Campaign Strategy – Coordinated and integrated plan of action – the broad plan to organize the company in question.

Campaign Tactics – The specific steps that are taken to execute the campaign strategy – getting from point A to point B.

Answer basic questions...

- **How is company organized?**

Corporation or partnership, for-profit or non-profit, subsidiary or parent, public or private, South African or foreign.

- **Who is in charge?**

Corporate officers, board of directors, major shareholders.

- **What does the company do?**

Lines of business, products, locations, customers, etc.

- **Where do they do their business?**

Identify plants, worksites, other subsidiaries, etc.

Answer basic questions... (Cont.)

- **How the company makes its money?**
- **Where the company raises capital?**
- **What is the company's strategy?**
- **What are its strengths and weaknesses?**

Some Sources of Information

- Members
- Internet
- Company Documents
- Company Intranet
- Other Company Sources

Some Sources of Information (Cont.)

- Media
- Industry Sources
- Lawsuits
- Other Unions
- Regulatory Agencies

Develop a *critique* of the company
and turn it into *leverage*...

- Where is the 'dirt'? How can you dig up more? And how do you best use it?
- How do you find and document regulatory and legal problems?
- Who else cares and can be organized to take action? (Union and community allies, shareholders and investors, regulators, elected officials, media).
- How can you get in the way of the company's strategy?

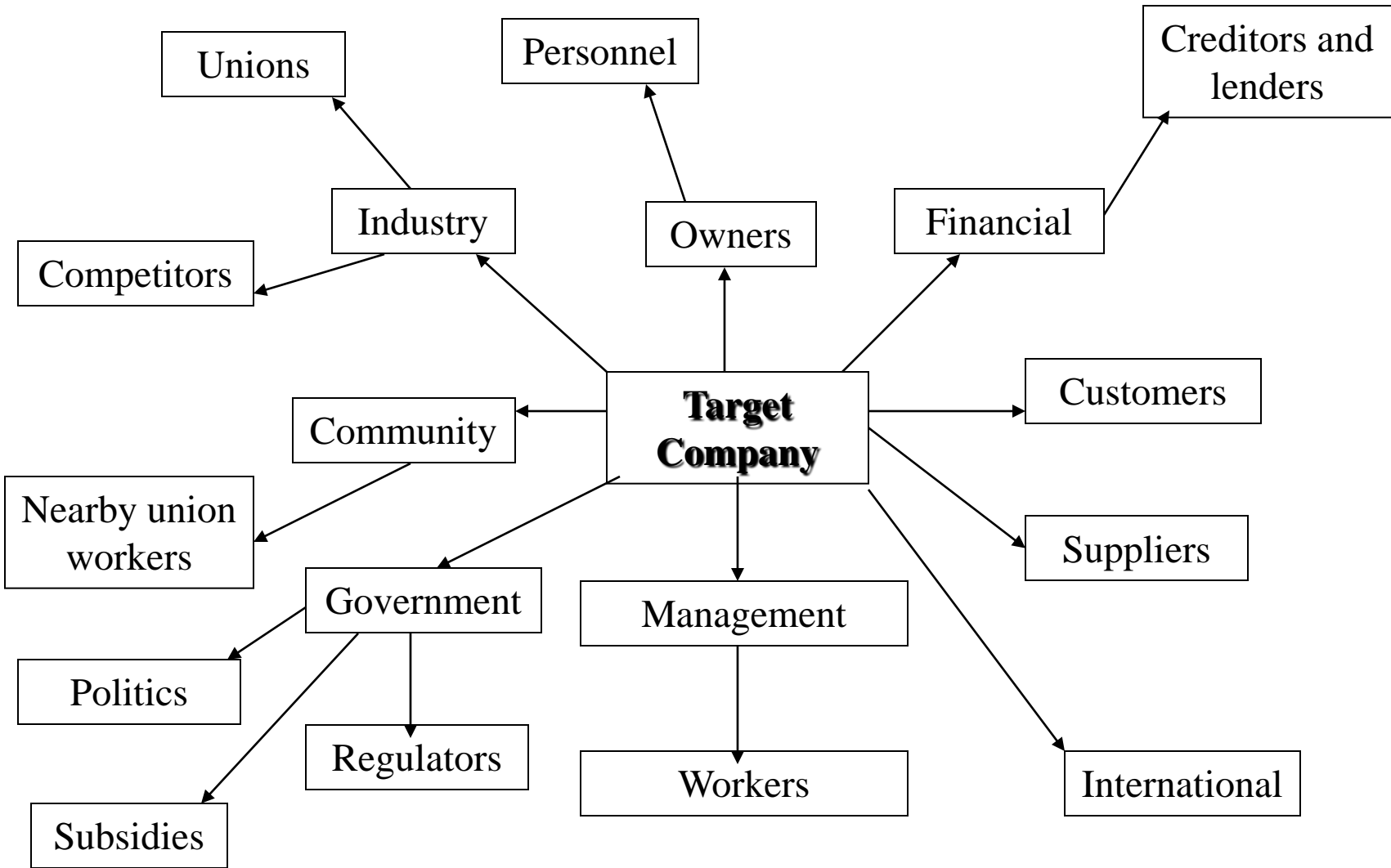
With Completed Research the Implementation of Strategic Campaign Means:

- building power in addition and/or in conjunction with mobilization;
- Having an industry vision;
- Picking your fights instead the company;
- Utilizing the union's treasury wisely and committing sufficient resources to win.

A corporation is a set of relationships between:

- Workers and management, *and*
- Management and directors,
- Directors and shareholders,
- Financial officers and creditors,
- Salespeople and customers,
- PR dept and the media,
- And many others...

Comprehensive Corporate Campaign



Strategic Campaigns Require Using:

- **Worker rights** – to publicly speak out and take non-violent concerted action.
- **Labor movement relationships** – to other unions, worker-owned capital, community allies, politicians.
- **Union Resources** – including member militancy, staff involvement, and financial resources.
- ***Strategic Research*** - *how to use these in a winning plan...*

Elements of a Strategic Campaign:

- Campaign strategy – the overall plan.
- Campaign tactics – actions to implement the plan.
- Campaign calendar – when to escalate tactics.
- Campaign theme – public message to express issues and goals of workers.

Some things to think about before you start:

- How much time do you have? What are your deadlines? When is this research needed for the campaign?

What is your plan? What are your priorities?

Some things to think about before you start:

- *What resources do you have?*

Where can you find free help and information?

How can you involve members?

- *How does it help you win?*

Who does it inform, convince or enrage?

Whom does it put pressure on?

How does this affect the company?

Some Basic Tips...

- Keep your facts straight – be accurate and keep good records.
- Make a research plan – know your priorities
- The best research sources are usually free - get information from the government (court cases, regulatory agencies).
- Involve workers in research – survey, interview, collect documents and evidence. And don't forget about former workers too, they often can be a goldmine.
- Talk to other organizers, researchers – maybe someone else has done this kind of research before. Don't reinvent the wheel.

Strategic Campaigns

Eight Principles

- Everything starts with the members.
- Research and develop a global picture of the company/industry. Think like the boss. Research should drive the strategy.
- Express campaign goals and issues as a fight for social justice. Seize the moral high ground.
- Include important elements of the broader community.

Strategic Campaigns

Eight Principles

- Devise a strategy that will impact the company's public image.
- Create real financial costs.
- Strategy should drive the tactics. Tactics start small and increase with intensity. Build momentum.
- Keep the pressure up. Compression is crucial. If the company knows you're relentless, they may weigh their options and decide a long fight is not worth it.