Introduction to Strategic Corporate Research
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1. Strategic Corporate Research
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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 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...
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.