

# **Introduction to Strategic Corporate Research**

National Labor College  
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# Introduction to Strategic Corporate Research

- Why is it necessary?
- What it means
- Strategic Corporate Research
- How it all fits together...
- Things to think about before starting...
- Some basic tips
- 8 principles

# Why is all of this necessary?

- Labor laws so tilted in favor of employers that unions need to engage in extraordinary measures to organize new members.
- At the same time, there are myriad laws and regulations (labor and non-labor) affecting employers that can be used to our advantage.

# Strategic Organizing Means...

- Building **power**, not just numbers;
- An **industry** vision;
- **Picking your targets** instead of your targets picking you;
- Using the union treasury wisely and committing **sufficient resources** to win;
- Involving the union's #1 resource: **members**.

# Strategic Organizing Means...

**Successful campaigns rest on a four-legged stool:**

- Non-union workers in motion
- Full weight of the union behind the campaign (members, resources, relationships)
- Community Involvement
- A fight focusing on the sources of corporate power



# 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
- To build power (density) for workers

# Strategic Corporate Research

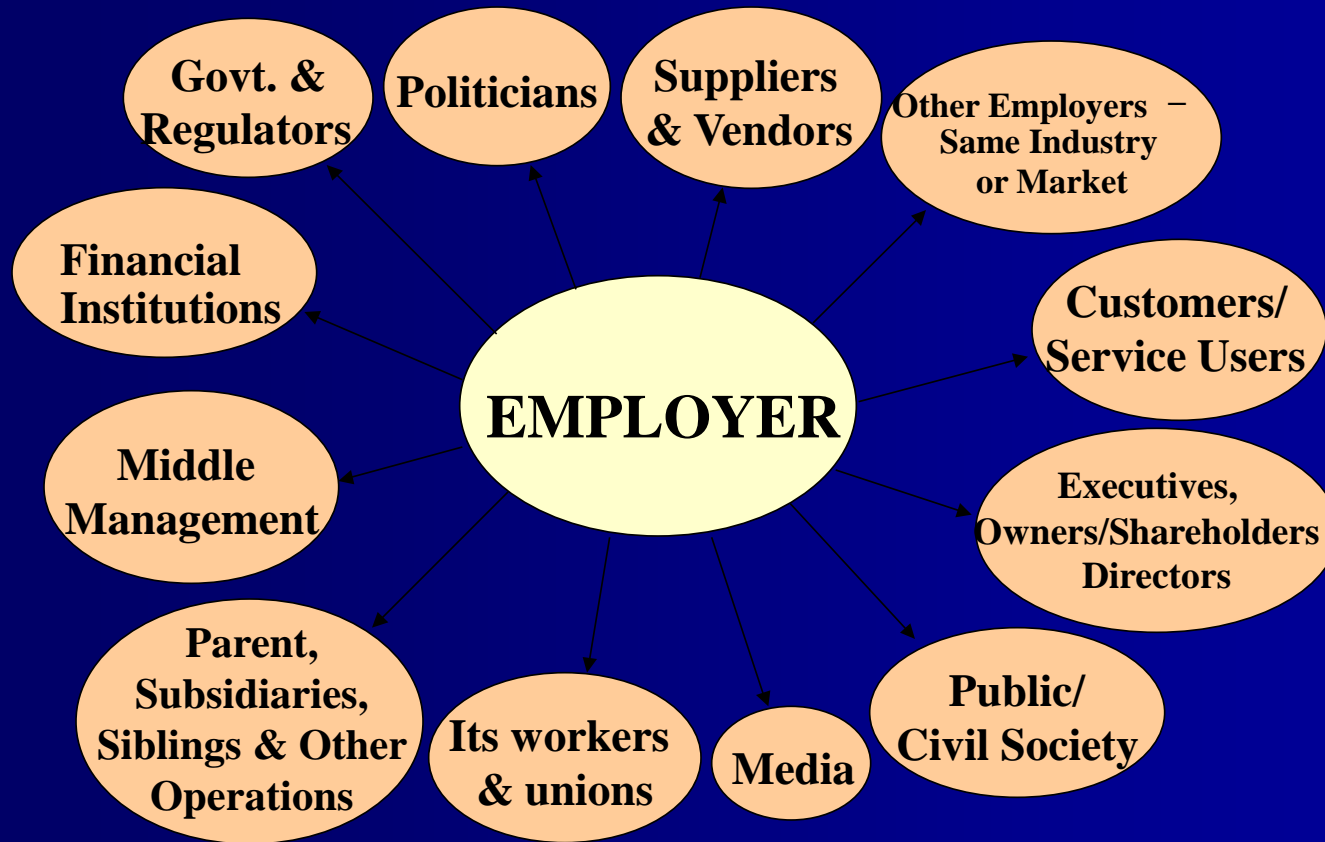
- We want to look at a corporation from the the boss's perspective – what are the employer's strategic relationships that allow the business to exist and profit?
- Once identified, we work to affect those strategic relationships to change how the boss deals with workers.

# 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...



# One way to look at these relationships is as a web...



# Bringing it all together...

Strategic campaigns: definition

- A plan of escalating actions
- to affect employer relationships
- to change employer decision-making
- to empower workers and unions
- to address issues and achieve goals.

# Bringing it all together...

## 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** - *using these in a winning plan...strategy, tactics, calendar, theme*

# Bringing it all together...

## Answering basic questions:

- **How is company organized?**

Corporation or partnership, for-profit or non-profit, subsidiary or parent, public or private, US 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.

# Bringing it all together...

## Follow the money:

- How the company makes its money
- Where the company raises capital
- Who is really benefiting

# Bringing it all together...

**Develop a company *critique* and turn it into *power*...**

- Find and document regulatory and legal problems
- How best to use them?
- Who else cares and can be organized to take action? (Union and community allies, shareholders and investors, regulators, elected officials, media)

# Bringing it all together...

## Targeting:

- Remember: Choose targets, don't let targets choose you.
- Sometimes can't avoid a fight, but...
- Hot shopping vs. strategic choice
- Industry leaders – build density
- Easy wins to establish campaign
- Poster child

# Some things to think about before you start:

- *How much time do you have?*

Deadlines? When is this needed for the campaign?

- *What resources do you have?*

Where can you find free help and information?

How can you involve workers and members?



# Some things to think about before you start:

- *What is your plan? What are your priorities?*

- *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. Let's not reinvent the wheel.