



Competitor/Collaborator Analysis Service Grant



The Strategy Management Practice is presented by Wells Fargo.



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Outline

- Strategy Management Overview
- How does the Competitor/Collaborator Analysis Service Grant fit in?
- What is a Competitor/Collaborator Analysis?
- Why do a Competitor/Collaborator Analysis Service Grant?
- What are the deliverables and what is considered in scope?
- What is not in scope for this Service Grant?
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline
- Spotlight: Breakthrough Collaborative and Pacific Institute

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Strategy Management

The Purpose:

- Help organizations thoughtfully explore their environments as well as their own strengths and weaknesses
- Monitor and measure progress towards an organization's strategic objectives
- Facilitate decision-making among key stakeholders

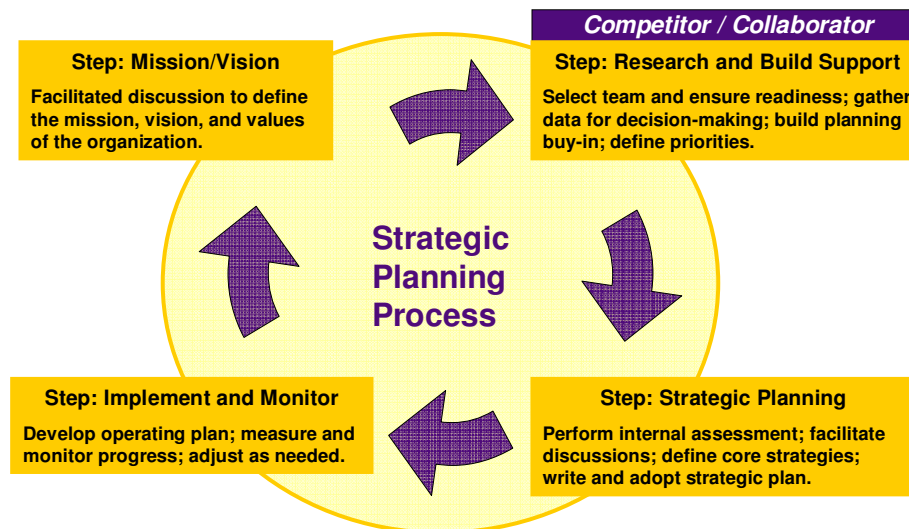
The Result:

- Detailed data collection and analysis, which provides contextual information organizations need to make good strategic decisions
- Established common terminology around strategic goals and objectives
- Framework for describing strategic execution

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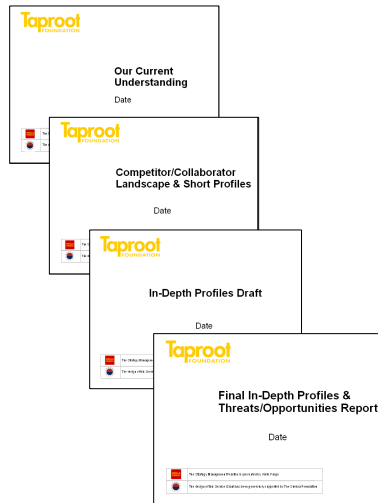
The Strategic Planning Process



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What is a Comp/Collab Analysis Service Grant?



The Competitor/Collaborator Service Grant:

- Identifies competitors/collaborators (defines competitive landscape)
- Gives background on the competitors' products, services and strategic goals
- Highlights the opportunities that gaps in the competitive landscape might pose
- Identifies where new competitors or competitor changes might pose threats

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Why do a Comp/Collab Analysis Service Grant?

Lacking information on your competitors puts your organization at risk of missing the chance to capitalize on competitive gaps or to collaborate with similar organizations.

This grant helps you understand your position in the competitive landscape and the strengths and weaknesses of similar organizations so you can make more strategic and informed decisions.

What Challenges Might Your Organization Explore through this Grant?

- Should you offer a new product or program?
- Should you enter a new market or new geography?
- Should you cut back/expand services?
- Are there opportunities for strategic partnerships you should explore?
- Are you at risk of being blindsided by a competitor or missing out on a market or collaborative opportunity?

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Activities in Scope

The grant scope includes:

- **Internal interviews** with your organization's staff and board members
- **External interviews** with identified collaborators and/or competitors
- **Other Discovery research**
- **Deliverables:**
 - ➡ Description and analysis of the competitive landscape
 - ➡ Short profiles of a wide range of potential competitors or collaborators (typically 15-20)
 - ➡ In-depth profiles of a select set of competitors or collaborators (typically 3-5)
 - ➡ Detailed threats and opportunities report

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Activities that are not in scope

- Strategic planning
- Complete environmental scan
- Negotiation for mergers, partnerships or collaborations
- Benchmarking
- Analysis of your organization's strengths and weaknesses as compared to your competitors
- Recommendations on how your organization can capitalize on opportunities or avoid threats

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Grant Criteria

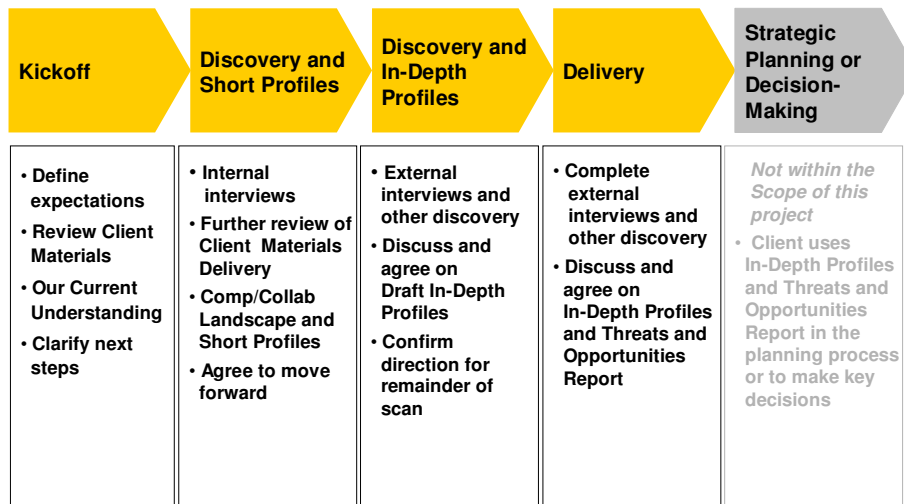
We recommend you apply if your organization has:

- An Executive Director and Board of Directors strongly committed to this project
- Either a current and complete strategic plan or the ability to describe strategic priorities and need for this information
- Staff who can invest the necessary time to make the project succeed:
 - Executive Director: 10 to 15 hours total
 - Day-to-Day Contact: 3 to 5 hours each week
 - Board of Directors Representative: 5 to 10 hours total

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The Process



* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Competitor/Collaborator Analysis Team

- Account Director
- Project Manager
- Strategy Consultant
- 2 Strategy Associates

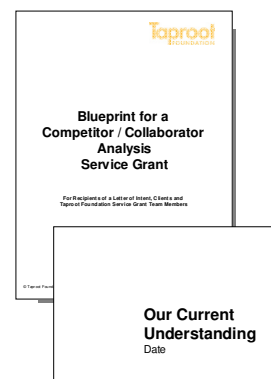
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Program Management and Tools

Your organization will be equipped with the following resources for the Competitor/Collaborator Analysis Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
 - Competitor/Collaborator Analysis blueprint
 - PowerPoint templates for: Our Current Understanding, Landscape & Short Profiles Report, In-Depth Profiles Report, Threats & Opportunities
 - Helpful articles and links



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) Sent	
Account Director Assigned / Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off Completed	2 – 3 months after LOI sent
Half of Discovery Interviews complete	4 months after LOI sent
Comp/Collab Landscape and Short Profiles Presented	5 months after LOI sent
Final In-Depth Profiles and Threats and Opportunities Report Presented and Approved	6 – 7 months after LOI sent
Project Closed	8 months after LOI sent

*Ultimately, depends on you and your team

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Spotlight: Breakthrough Collaborative and Pacific Institute



"The service grant from Taproot allowed us to address a critical area of work, and to approach it in a **strategic and purposeful manner**. Now, instead of evaluating partnership opportunities by the strength of our personal connections, we have a **formal rubric**. The **volunteers' industry experience** was phenomenal, and they performed work that we could not have done on our own."

BETH C. PORTER
National Executive Director, Breakthrough Collaborative

"I was so impressed with how quickly the team learned not only about us, but about our nonprofit landscape and our peers. The team was able to pick up on the **nuances and challenges** of our work so quickly it was almost scary. Seeing ourselves and our peers through their eyes and their sharp analysis really helped us **reframe some of our core challenges and opportunities.**"



SWATI PRAKASH
Program Director of Community Strategies for Sustainability and Justice Program, Pacific Institute

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