

STEP 2: INTELLIGENCE GATHERING

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In Step 1 Prioritize we shared our views on best practice around priorities, objectives, and KPIs in Public Affairs. Prioritization is the central foundation of your advocacy strategy because it defines the boundaries and sets the point on the horizon for every other aspect of your advocacy, including today's post on intelligence gathering. Your priorities and objectives define the scope of your intelligence gathering. A scope that resources demand to be narrow and focused. The tighter the scope, the fewer resources consumed and the higher quality delivered by your intelligence gathering.

Effective intelligence gathering requires acquiring the relevant and insightful information at the right time, in order to inform your advocacy prioritization, your advocacy strategies and activities. Intelligence provides both insight and feedback. If advocacy success is often about ensuring you are talking to the right person, in the right place, at the right time, with the right information, then you can appreciate the importance of effective intelligence gathering. If your information and intelligence is inaccurate or untimely, or your analysis ignores political reality then you won't be able to succeed in your advocacy work.

Intelligence consists of two types of information: monitoring and political intelligence. The former is the collection and analysis of publicly available information that you (usually) find online or in the (social) media. The latter is the collection and analysis of non-public information derived from political institutions. Non-public information is usually information obtained in a meeting or through a conversation. Non-public information is the high value resource you need to cultivate through networking, attending events, calling officials and elected representatives and talking to journalists.

Publicly available information should be seen as raw data that requires analysis and verification. Public information gives you the building blocks to go further. It provides information on the sequencing of events, what happened, what will happen, what was said and written. It ensures you have the timeline of events and decisions made by others. However, following developments is a passive approach. Playing a pro-active and constructive role, influencing decisions requires engagement with the political process and the acquisition of valuable political intelligence. Combining both monitoring and political intelligence maximizes your chances of success and moves you from passive intelligence gathering to active intelligence gathering.

For publicly available information it is possible to build robust monitoring systems that generate high-quality intelligence data without too much cost or difficulty. In fact, in the digital age, the problem isn't one of information shortage, rather it is the glut of information accessible from the internet and

(social) media. Sometimes, indeed, it feels like you are drowning in intelligence data. To overcome this problem, you need to set up a system to monitor the flow of intelligence and information that can decipher the important signals from the noise. The goal is to analyze the important data and discard the rest. We come back to filtering below.

Intelligence gathering and analysis bridge your prioritization process and your positioning work. It allows you to maintain a focused set of priorities and objectives, but also provides knowledge and insight that shape your positioning and your advocacy management. When translating the intelligence try our [monitoring report checklist](#) and consider 5 Ws and 1 H:

1. Who was involved? Who is in charge? Who does it impact?
2. What happened? What was the decision? What should I know?
3. Where did it take place? Where is affected? Where can I get more info?
4. When did it take place?
5. Why did that happen?
6. How did it happen? How was the decision made? How does it impact me? How will we communicate internally / externally?

Intelligence feeds into some of your key advocacy documents: monitoring report (what happened), Issue timelines (right time), stakeholder maps (right person) and position papers (right information). From the outset your intelligence gathering must deliver insight for your key advocacy documents. Consider this as an intelligence filter. There are several approaches to filtering intelligence: you can do all of this yourself, delegate it to a colleague, get a consultancy, use dedicated software and/or use a combination of all these approaches. A mix of options is the usual and best choice to deliver the right (verified) information ahead of time.

A major part of successful intelligence gathering is filtering to determine what becomes a strategic consideration and what stays out. Good filtering of intelligence is a system that only transmits intelligence on your key issues, with specific relevance to the priorities and objectives you have clearly determined in advance. Your intelligence system should be subject to regular, say six-monthly, iterative reviews and updates. Check-in with those who receive the intelligence information. Is the intelligence relevant? Is it sufficiently focused on the priorities? Is it well-structured and well-presented? Is the frequency good?

The intelligence information required for decision-making as well as for advocacy activities must be acquired at a steady pace. As mentioned above, it is going to come largely from public domain monitoring, media updates (mainstream media, political press, trade and regulatory media, social media), raw political intelligence and analysis from outside counsel. There are four core elements to a comprehensive monitoring process:

1. Timelines: Developments and any key milestone dates in a process.
2. Stakeholders: Selected priority stakeholders and new ones.
3. Issues: What is being said on your issue, by whom and when.
4. Events and reports: What is happening and published or about to be.

All of this monitoring and intelligence information empowers you to know when to act, what to say and whom to speak to. This prepares your advocacy action. Explore our [issue tracker template](#). It summarized key advice and offers tables for organizing your intelligence data to support decision-

making. The real challenge of effective monitoring and intelligence gathering is to find the system that works for you as well as for your resource and budget constraints. In many ways the most effective political intelligence gathering strategy is rather 'old school'. It relies on gathering nonpublic information by meeting and listening to the people making and influencing the decisions in both formal and informal settings. Your objective should be to understand what is driving events, and the best way to understand this is to meet people and listen to what they have to say. Gathering political intelligence is clearly time and resource consuming. To manage this you can consider two strategies:

1. Manage political intelligence yourself using associations and contacts, and, on occasion, an agency when their contacts and network are required.
2. Outsource pure monitoring to specialist consultancies and platforms. This is relatively cost effective. The information can be tailored and on-time.

To succeed you will need to use a mix of good monitoring and political intelligence. Under-investing in either will harm your advocacy. Well-executed monitoring identifies the tell-tale signs that policy or political action is coming. Having an effective intelligence system that tracks political developments, policy and scientific journals, can act as an effective early warning system. Many governments, companies, consultancies, trade organizations and NGOs develop their own bespoke intelligence gathering and analysis systems. These flag relevant developments and enable them to act before the Rubicon is crossed. Despite this, many governments, EU and non-EU, industry players and NGOs frequently miss important policy, timeline or stakeholder developments. When you look behind the shock and surprise you will often find that the problem originates in an inadequate intelligence gathering system.

In conclusion, our practical advice on intelligence gathering can be summarized in four key points:

1. **Relevance:** At the very start make sure you align your intelligence gathering to your priorities and objectives. Review the priorities and intelligence output at the very least every 6 months to make sure it is all still fully aligned to your priorities. This will ensure your intelligence gathering will remain focused only on what is important.
2. **Formatting:** Spend time thinking about your information reporting format for your audience. What works best? What is the easiest way for you to do it? Getting this right can not only save you time and energy, but also boost your professional visibility.
3. **Balance:** Make the distinction between pure monitoring work and political intelligence, and be sure to have a clear view of how you intend to acquire public and non-public intelligence. You will need both to be successful.
4. **Transfer:** Intelligence gathering needs to feed into updated timelines (make sure you have timelines), stakeholder maps, issue updates and your advocacy plans (which will be based on what your intelligence is telling you). Establish a list of key documents that require regular updating with intelligence analysis and define a process for updating them.

In future posts we'll be exploring each of the subsequent 7 steps to clearly define their purpose, but also to identify the key knowledge, skills, tools, and deliverables contained within them. To further explore our 7-steps of advocacy method as well as our free advocacy tools, including our [free advocacy assessment 7-step snapshot report](#), please visit: www.advocacystrategy.com