

PURPOSE

The purpose of the Intent Matrix tool is to bring more clarity to existing societal engagement activities along the two dimensions of **business motivations** (why to engage) and **engagement approaches** (how to engage), a process that typically surfaces opportunities for realignment and optimization of resource allocation.

WHEN TO USE

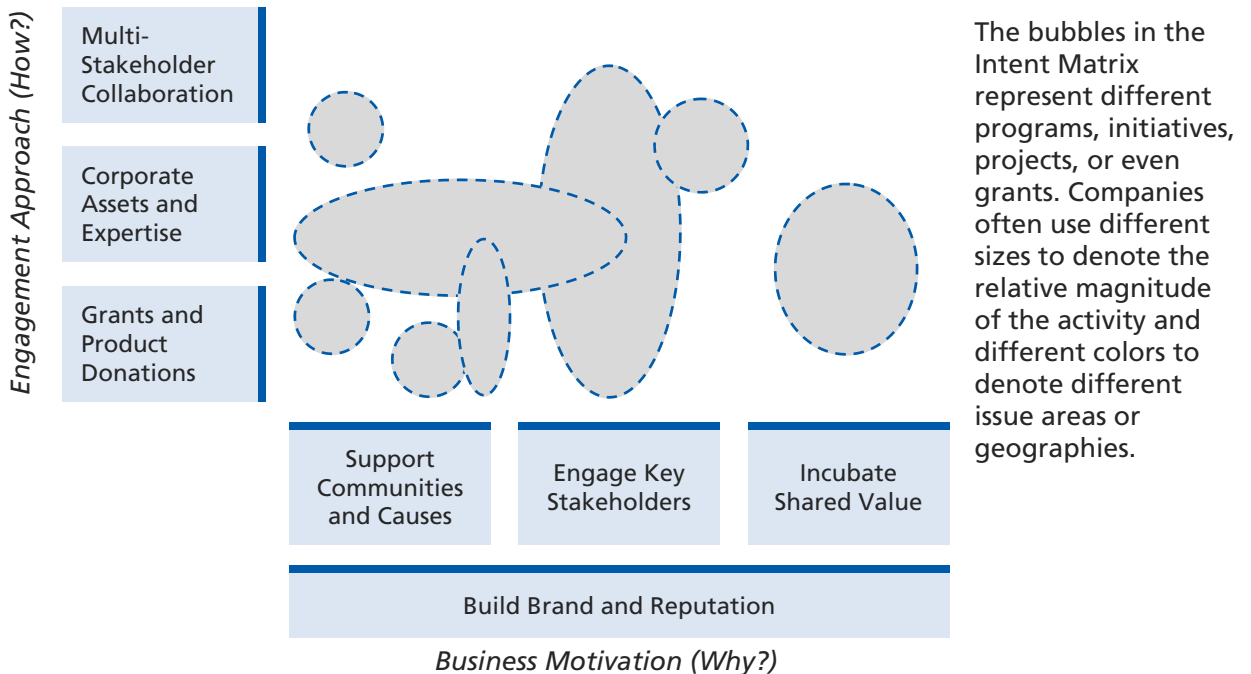
The Intent Matrix is a **powerful starting place when refreshing an entire societal engagement strategy**. The tool is designed to provide a baseline visualization of current activities and trigger discussion about whether there is clarity and alignment on distinct business motivations and differentiated engagement approaches.

HOW TO USE

Using the tool entails a **three step process**.

- **Make the matrix specific to the company** | Below, we offer a starter list of business motivation and engagement approach categories. Every company is unique, however, so the first step is to adjust the labeling or content of these categories to reflect the dynamics of a specific business or industry.
- **Plot activities in the matrix** | Once the matrix labels make sense for the company, plot current activities (programs, projects, large grants) into the matrix. This process typically reveals two realities: one, there are a surprising number of activities and two, these don't necessarily align well with addressing intended business motivations.
- **Facilitate a conversation about the future** | With the baseline visualization in hand, teams can discuss with their colleagues what works about the current situation and what warrants an overhaul. They may wish to prioritize issues differently (see Issue Monitor tool) or rearrange activities to get more impact (see Impact Model tool).

INTENT MATRIX



PURPOSE

The purpose of the Issue Monitor tool to provide a *multi-dimensional process for prioritizing the issue(s)* on which a company should focus its societal engagement.

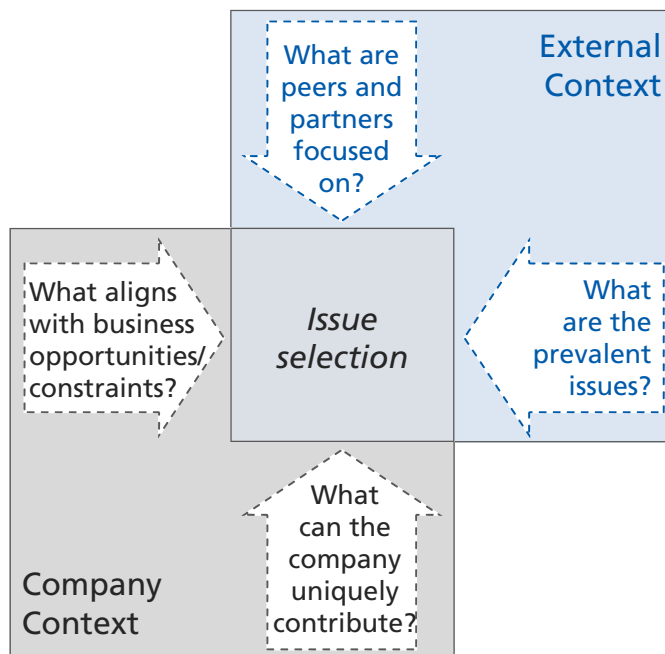
WHEN TO USE

The Issue Monitor is the *right tool to use when determining the issues a company prioritizes*. This could come about when assessing the fit of a new potential issue, when conducting an annual “refresh” of what specific aspects of an issue to focus on, or through a more comprehensive strategic planning process that includes revisiting overall issue selection and prioritization.

HOW TO USE

The tool is designed to *answer four basic questions that combine both internal and external perspectives*. More detail on each question is provided below. Typically, companies start with the internal questions to create an initial narrowing of potential issues and then layer on the external questions. However, in reality this process is iterative. New insights into the external context lead companies to revisit their potential set of unique differentiators or develop new corporate priorities to reframe their understanding of the landscape of potential issues. Going through the Intent Matrix exercise described in the previous section can provide a running start for this tool. Once all questions are answered, the process entails identifying issues that are at the “sweet spot”—that fit the company context, leverage unique corporate assets, address pressing issues, and are either aligned or contrast sharply with peers (depending on whether there is a motivation to partner or differentiate). Overall this process is more “art” than “science,” but we have found that companies benefit greatly from being empowered to gather the latest information from colleagues, peers, and issue experts.

ISSUE MONITOR



Selecting the right issue(s) requires combining several perspectives from both the company and external context. Specifically, companies need to overlay the answers to four questions.

1. What aligns with business opportunities/constraints?
2. What can the company uniquely contribute?
3. What are the prevalent issues?
4. What are peers and partners focused on?

The first and third questions are similar to the logic behind materiality assessments. Additional areas for consideration, referenced in CECP’s Issue Ripeness Tool, released with McKinsey (2010), include external perceptions of the severity of the issue(s) for current or future generations and the potential for consumer/employee backlash as well as internal perceptions of the gravity of the issue(s) for the company, and potential for new business opportunities.

PURPOSE

The purpose of the Impact Models tool is to provide *clear options for engaging on the selected issues* and to accommodate different realities and readiness conditions.

WHEN TO USE

The Impact Models should be used to *shape detailed strategies and implementation plans* for specific issues on which the company wants to engage. The models help clarify what kinds of resources to allocate, how integrated or decoupled activities are, and whether the company seeks to affect symptoms or root causes.

HOW TO USE

Each of the four models offers inherent benefits and challenges to a company; *there is therefore no one right model*. In fact, companies can and often do migrate from one model to another depending on different internal and external dynamics. It is also fairly common for multiple models to co-exist in a company's overall societal engagement portfolio, reflecting varying needs of different issues, geographies, brands, or stakeholders. The key is to match the right model based on company-wide and local conditions as well as capacity and culture. For example, if the budget to gain deep content knowledge is limited, it will be hard to build an in-depth signature initiative. If executives are unwilling to share credit, a structured collaboration approach may not be the best option. If the company prefers breadth to depth in certain locations, then sticking with small grants in those locations is the right way to go. These reality-check factors are not meant to discourage an ambitious future vision, but rather to create a strategy and implementation plan that is feasible and practical based on a company's internal and external realities.

IMPACT MODELS

Based on our experience, we have identified four common models for organizing corporate societal engagement activities. Landing on a preferred model (or combination of models) guides strategic choices and illuminates the key success factors and considerations for a company to focus time and resources on.

