



# Working Together for a Better World

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for tools and guidance

*Through Strategy, Teamwork, and Leadership*

*I'll take you on a journey to new places*

## IX. Competitor Assessment – A Detailed Planning Tool

<b>Organization</b>
<b>Address</b>
<b>Web site</b> <span style="float: right;"><b>Phone</b></span>
<b>Key Contact Name/Title</b>
<b>Mission</b>
<b>Why do you call it a competitor? Is it a close competitor or 2nd level competitor?</b>
<b>Program Services and Strategies</b>
<b>Estimated Annual Budget or Revenues (Currency)</b> <span style="float: right;"><b>Year</b></span>
<b>Number of Employees</b> ___ <10 ___ 11-25 ___ 26-99 ___ 100-299 ___ 300 and more <b>Trend</b> _____
<b>Best Estimate of Revenue (%) from</b> ___ <b>Grants and Contracts</b> <span style="float: right;">___ <b>Individuals</b></span> ___ <b>Corporations</b> <span style="float: right;">___ <b>Government</b></span> ___ <b>Foundations</b> <span style="float: right;">___ <b>Support from other countries</b></span> ___ <b>Sales</b> <span style="float: right;">___ <b>Other (describe)</b></span>

## Competitor Assessment: Worksheets for Strategic Planning

**Major Contributors (list)**

**Trends results over the past few years / Comments**

**Types of Marketing/PR used**

**Proposals**

**Brochures and Annual Reports**

**Paid Advertising or Direct Mail**

**Fundraising/Marketing Staff**

**Conferences**

**Media**

**Fundraising Events**

**Other (describe)**

**Comments:**

**What does it do in advocacy or policy? What is its strategy for this? How successful is it?**

**Strengths: What Can We Learn From This Organization?**

## Competitor Assessment: Worksheets for Strategic Planning

**Weaknesses: What Should We Avoid That This Organization Does?**

**Recommendations for Partnering**

**Recommendations for Setting New Benchmarks for Us to Achieve**

**Additional Comments/Observations**

**Person Completing Survey Form**

**Date**