

Partner Research and Databases

External Relations - Chapter 7
BEE Tutorials

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Partner Research

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Why is it important

Researching is one of the first and most important phases of External Relations. Why? Because it is here where you investigate the externals that you have identified as potential partners and see if you have common interests that can be explored.

For that reason, doing a thorough research is important in order to ensure that you understand the external in the best way possible, not making any misjudgement in the future, when planning the proposal or negotiating.



What to look for

When doing the research there are some things that are important for you to look for:

- If they can indeed support with what you need (if they have experts in the topics you need, if they are present in your city, etc);
- What are their values and what do they stand for (internationality, diversity & inclusion, educational opportunities, etc);
- Prizes and main achievements;
- People that you may know inside the organisation (ex. Alumni);
- Relationship with other organisations.



What to look for

With this information - and other that may be suitable according to the concrete organisation you are researching - you should be able to define the organisation and understand (i) what it aims to do; (ii) what it stands for; (iii) what makes it different from others; (iv) what it needs from you.

With that information you can see whether approaching them makes sense for your Group.

You will find a template for researches in the Officers' Portal, with some basic categories of information to look for.



Where to look for

The starting place to research info is a very straightforward one: the website of the organisation. Important pages to keep in mind are the sections such as “about us”, “where we are” and other pages related to their values, namely social responsibility, etc.

As a follow-up to that you can also check their social media in order to receive more frequent information.

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Where to look for

Nevertheless, there are other sources of information that allow you to have a more in-depth understanding of the external. Those are:

- Their annual reports and strategic plans: not every external has these documents published, but looking at them gives you an extra edge in understanding the external and what they aim at;
- Indexes and rankings: for law firms, chambers and partners is a good example of where to start. This gives you an overview of the ranking of law firms worldwide, as well as their main areas of expertise and main lawyers;
- Newsletters: most organisations provide newsletters to people interested in them. Think of subscribing to them in order to receive more information regularly.

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Databases



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Why do we need them

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Why do we need them

Databases are the way through which we keep track of what we do, what we know and our results. Through them, we make our successors' lives easier as they can use our example as a starting point to plan their term and act accordingly.

Thus, while keeping track of what is done and learnt through the years, we help whoever comes next avoid doing the same mistakes, helping the Association grow with it.

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What to register

When it comes to External Relations, there are many things you should keep track of:

- The partners' researches - keep track of the information about partners you find and store them in a space easily accessible;
- The approaches you have been doing - by keeping track of who you contact, the success of those approaches and your feedback on what went good and bad, as well as your recommendation to proceed with the contact or not, you give your successors a guiding light on what to do;
- The relationship with your current partners - do not neglect the partners you already have. By keeping track of what you do through the year, you help your successors keep a good relationship and have an idea of how to include them.

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How to register

Here, simplicity is key. It is also important for you to keep all information easily accessible and centralised so that your successors can easily build on it and find it quickly.

For that reason, it is advisable to have one general excel for the approaches you have, plus the engagement of the current partners, with links for the research documents you produce.

When it comes to storage, it is advisable to keep this in the day-to-day working space of your Board, so as to make it easily accessible. Do not over complicate things, or else information will get lost.

You will find templates to help you in this regard in the Officers' Portal.

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Lesson 7 done!

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