Competitive intel checklist

| **Date last reviewed:** DD/MM/YYYY | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Category** | **Activity** | **You** | **Competitor #1** | **Competitor #2** | **Competitor #3** |
| **Market** | Who are their target customers? Including segments *and* verticals. |  |  |  |  |
| How many customers do they have?  Some companies will have this published on their site, others might require a bit of digging. |  |  |  |  |
| Do they have any big-ticket businesses on their client list? Of these, which are referencable case study clients?  They’ll shout about it if they do, so this one should be easy to find out. |  |  |  |  |
| What countries do they operate in? |  |  |  |  |
| What do their positive online reviews say? What do their negative online reviews say? What negatives are included in their **best** reviews? Consider using extracts from some in here, along with their star rating (if applicable). |  |  |  |  |
| Are there any trends among their online complaints? And how have these trends changed over time? |  |  |  |  |
| **Product** | What suite of products do you and your competitors offer? |  |  |  |  |
| What are the defining features of the aforementioned products? |  |  |  |  |
| What are the value drivers or intended customer outcomes of the aforementioned products? |  |  |  |  |
| How much do you charge versus how much do your competitors charge? |  |  |  |  |
| Are they currently running any discounts or promotional offers? And for enterprise sales scenarios, are typical discounts offered? |  |  |  |  |
| What are their perceived strengths? |  |  |  |  |
| What are their perceived weaknesses? |  |  |  |  |
| Do they offer free trials? Or pilots? |  |  |  |  |
| Do they have any partnerships? If so, who with? |  |  |  |  |
| Where can customers find help documents and articles? |  |  |  |  |
| If you have access, what’s their user experience like? Breakdown the pros and cons. |  |  |  |  |
| **Positioning** | How do they currently differentiate themselves from the rest of the market? |  |  |  |  |
| What messaging do they use? |  |  |  |  |
| What use cases do they have listed? |  |  |  |  |
| If applicable, how does the messaging change between different segments, verticals or use cases? |  |  |  |  |
| **Marketing** | What’s their tagline? |  |  |  |  |
| How much activity is there on their marketing channels? Think about things like blogs, social media, webinars, eBooks, emails, podcasts, newsletters, etc. |  |  |  |  |
| What **types** of content are in their three most important channels? I.e. thought leadership, practical how-to’s, product-oriented, etc. |  |  |  |  |
| What kind of marketing approach do they take? Do they target their industry as a whole? Or do they use account-based marketing (ABM)? |  |  |  |  |
| What kind of topics do they talk about? And what kind of keywords do they bid on?  **Tip:** a spike in previously uncovered topics *could* be a clue they’re bringing out something new. |  |  |  |  |
| Do they get much engagement? |  |  |  |  |
| How effective is their social reach? Split this by channel - i.e. Facebook, Twitter, LinkedIn, Instagram, etc. |  |  |  |  |
| What are they saying in their press releases, paid campaigns, events, etc? |  |  |  |  |
| Do they have any partnerships? If so, who with? |  |  |  |  |
| Do they run events? And/or attend tradeshows? |  |  |  |  |
| How does their organic ranking compare to yours? |  |  |  |  |
| How would you describe their website’s visual identity? Have they recently had it redone? |  |  |  |  |
| Do they have any cool tools, calculators, quizzes, apps, etc.? |  |  |  |  |
| Do they currently or have they recently ran any competitions or campaigns? |  |  |  |  |
| **Sales/customer success strategy** | What does their sales process look like? |  |  |  |  |
| How long does their sales cycle take? |  |  |  |  |
| Do they provide things like live chatbots? If so, what’s that experience like? |  |  |  |  |
| Do they have any partnerships? If so, who with? |  |  |  |  |
| What types of sales assets do they use? You may be able to find some of this online, or if you’ve recently hired someone from a competitor, pick their brains. |  |  |  |  |
| What’s their response time like for customer requests/questions?  If it’s either really good or really bad this is usually something you can pull out from reviews/complaints |  |  |  |  |
| How do they escalate customer complaints? |  |  |  |  |
| **Company** | Have they had any recent acquisitions? Or been acquired themselves? List any that have taken place in the last 3-5 years. |  |  |  |  |
| How would you describe their growth trajectory? |  |  |  |  |
| How many employees do they have? Break these numbers down by major departments. |  |  |  |  |
| Where are their support teams based? |  |  |  |  |
| Where are their sales teams based? |  |  |  |  |
| Which departments, if any, are having a recruitment surge? |  |  |  |  |
| What words describe their customer-facing teams? |  |  |  |  |