

Competitive intel checklist

Date last reviewed: DD/MM/YYYY

| Category | Activity | You | Competitor #1 | Competitor #2 | Competitor #3 |
|---------------|---|-----|---------------|---------------|---------------|
| Market | <p>Who are their target customers? Including segments <i>and</i> verticals.</p> <hr/> <p>How many customers do they have? Some companies will have this published on their site, others might require a bit of digging.</p> <hr/> <p>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.</p> <hr/> <p>What countries do they operate in?</p> <hr/> | | | | |

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/custo
mer
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?
