**Competitive Intelligence**

**Scorecards Template**

Competitive intelligence, sometimes referred to as corporate intelligence, refers to the ability to gather, analyse, and use information collected on competitors, customers, and other market factors that contribute to a business's competitive advantage.

In preparing a Competitive Intelligence Analysis, you should first make a complete list of the companies that compete with your firm directly, and those that may compete for customer capital indirectly. For each, prepare the following Scorecard. For each table you can add windows.

|  |  |
| --- | --- |
| Competitor’s Name: |  |
| Corporate Address: |  |
| Product Category: |  |

Scope: Local Regional National International

Appendix 1 to your CI report should be the CV’s of the senior officers of your competitors, including length of time at this firm and any previous positions held at other companies. Also, particularly in the case of B2C companies, any presenters used for image purposes by your competition.

Appendix 2: In an appendix to your report, include any marketing or promotional material that is available for your competitor’s product/service: brochures, case studies, videos, white papers, images, infographics, etc. Similarly, to the extent possible, include an appendix with a list of the locations in which their products or services are sold, with an indication of whether or not your products/services are present in the same market.

**Competitor’s Legal and Financial Status**

Is your competitor a sole proprietorship (SP), partnership (P) or traded company (TC)? What is the amount of debt it is carrying, and what is its credit rating? Compared to your company? In the table below, for both you and your competitor, indicate the legal status of company, credit rating and amount of leverage.

Table 1a

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name | Legal Status | Leverage | Credit Rating |
|  |  |  |  |
|  |  |  |  |

If your company is in the B2B market, indicate what trade credit terms you and your competition offer to your buyers.

Table 1b

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name | Trade Credit | Financing | Terms |
| Us |  |  |  |
| Them |  |  |  |

If your company is in the B2C market, indicate whether or not you and your competition issue your own credit cards and club cards.

Table 1c

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name | Credit Care (Name) | Club Card | Bonus Points/Milage |
| Us |  |  |  |
| Them |  |  |  |

If your company is in the B2C market, indicate whether or not you and your completion participate in Affiliation Marketing and who the Partners are.

Table 1d

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name | Affiliate Partner 1 | Affiliate Partner 2 | Affiliate Partner 3 |
| Us |  |  |  |
| Them |  |  |  |

**Competitor Product/Service Summary**

Insert in Table 1 below your company’s product/service and the competitor’s product/service that compete with your company’s, directly or indirectly (indicate which). You can add sections as needed. Information should include:

Which of their products/services compete with yours, and do they compete directly or indirectly? Is their product a direct substitute for yours? In the table below, list the names of the product/service and whether the competition is direct or indirect? What is their quality relative to yours (be honest)

Table 2

|  |  |  |  |
| --- | --- | --- | --- |
| Product/Service Name | Dircect/Indirect | Quality |  |
|  |  | Ours | Theirs |
|  |  |  |  |
|  |  |  |  |

**Product/Service Target Markets**

* What demographic(s) is your competitor’s target market(s)? Demographics can include gender, age, ethnic/religious, income bracket, price point, geographic, urban/rural, inner city/suburb, etc.
* How do *they* market them? Direct sales (catalogues, internet), own stores, distributors, resellers, etc.). In the event of own stores, include in an appendix the addresses of their stores. In the event of an internet presence, indicate their web address. In the event of resellers, indicate in an appendix the names and corporate addresses of each of the resellers. In the case of distributers, in an appendix list the names and corporate addresses of each distributor.

Customer satisfaction surveys conducted by the trade press can help you tremendously.

Table 3

|  |  |  |
| --- | --- | --- |
| Product/Service Name | Demographic | Marketing Approach |
|  |  |  |
|  |  |  |

**Advertising/Media**

How do they advertise their product/service? Indicate both category and actual media used in similar geographic markets.

Table 4a

|  |  |  |
| --- | --- | --- |
| Product/Service Name | Us | Them |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

In the event of a B2B market, in which trade shows do you and your competition appear.

Table 4b

|  |  |  |
| --- | --- | --- |
| Name of Trade Show | Us | Them |
|  |  |  |
|  |  |  |
|  |  |  |

**How do customers see your competition (Position)?**

Take a look at customer satisfaction surveys (indicate which by name and date) for both your product/service and theirs.

Table 5a

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Product/Service Name | Us |  | Them |  |
|  | Source | Rating | Source | Rating |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Separate from the overall customer satisfaction with both you and your competitor, how is customer support (where relevant) perceived? Again, cite outside surveys.

Table 5b

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Customer Support | Us |  | Them |  |
|  | Source | Rating | Source | Rating |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Product/Service Feature Comparison**

For each product, complete a table as show below. Name your competitor’s product/service name that you’re competing against. Include the top 3 features that are the USP[[1]](#footnote-1) of the product/service.

Table 6

|  |  |  |  |
| --- | --- | --- | --- |
| Product/Service Name | Features | Ours | Theirs |
|  | 1 |  |  |
|  | 2 |  |  |
|  | 3 |  |  |

**List of Distributors/Resellers**

Insert in the table the names and corporate addresses of their distributors and resellers. Rank them in terms of their market presence or power, as well as whether or not you work with them. In the event of resellers, indicate in an appendix the names and corporate addresses of each of the resellers. In the case of distributers, in an appendix list the names and corporate addresses of each distributor. In each case, in the appendix, indicate in which states/cities or countries the resellers/distributors are active.

Table 7

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Rank** | **We Work with them (Y or N)** | **Address** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Trademarks and Patents**

Insert in this table a list of brand names they have trademarked, and any patents they hold. For patents, indicate the expiration date. Show also their logos relative

Table 8a

|  |  |  |
| --- | --- | --- |
| **Trademark/Patent** | **Registration Date** | **Expiration Date** |
|  |  |  |
|  |  |  |
|  |  |  |

Table 8b

|  |  |  |
| --- | --- | --- |
| **Logos** | **Ours** | **Theirs** |
|  |  |  |
|  |  |  |
|  |  |  |

Table 8c

|  |  |  |
| --- | --- | --- |
| **Marketing Budget** | **Ours** | **Theirs** |
| Advertising Budget |  |  |
| Social Media Budget |  |  |
| Total Marketing Budget |  |  |

Table 8d

|  |  |  |
| --- | --- | --- |
| **Product Development Budget** | **Ours** | **Theirs** |
| R&D Budget: two years ago |  |  |
| R&D Budget: last year |  |  |
| R&D Budget: this year |  |  |

Table 9

Social Media Scorecard: what is our social media presence vs. that of our competition.

|  |  |  |
| --- | --- | --- |
| **Marketing Criteria** | **Us** | **Them** |
| ***Web site address*** |  |  |
| Number of visits |  |  |
| Downloadable (blogs) |  |  |
| Email address(s) |  |  |
| Number of Videos |  |  |
| Number of testimonials |  |  |
|  |  |  |
| ***Twitter Handle*** |  |  |
| Number of followers on Twitter |  |  |
|  |  |  |
| ***Facebook Link*** |  |  |
| Number of Followers on FB |  |  |
| Number of Visits |  |  |
| Number of Impressions |  |  |
|  |  |  |
| ***Linkedin Page Link*** |  |  |
| Number of followers on LinkedIn |  |  |
| Number of Visits |  |  |
| Number of Impressions |  |  |
|  |  |  |
| Instagram Handle |  |  |
| Number of followers on Instagram |  |  |
| Number of visits |  |  |
| Number of Impressions |  |  |
|  |  |  |
| YouTube Channel Link |  |  |
| Number of subscribers on YouTube |  |  |
| Number of videos on YouTube |  |  |
| Number of Visits |  |  |
| Number of Impressions |  |  |
| Frequency of Updates |  |  |
|  |  |  |
| ***Amazon Presence*** Page link |  |  |
| Amazon Fulfilment |  |  |
| Self-fulfilment |  |  |
| Number of star ratings (1 to 5) |  |  |
| Number of ratters |  |  |
| Amazon Ranking |  |  |
|  |  |  |
| ***AdSense*** |  |  |
| Tags |  |  |
| Banner Type |  |  |
| Banner Size |  |  |
| Banner locaton |  |  |

If either of you have launched email campaigns, discuss here the dates and names of the campaigns, and the general thrust of the campaigns.

**New Product Launch**

If you are launching a new product:

Use this section to earmark the activities that you will undertake to take on your competition.

* List down the objectives of your plan – more revenues, more customers, market size (%).
* Name the stakeholders and what are the responsibilities for getting new features on board.
* Explain how you launch new features in your product – campaigns, social media promotions, emailers, landing page etc.
* Note down the metrics that you will measure to know how successful your features launch is.

1. Unique Selling Proposition [↑](#footnote-ref-1)