Competitive Analysis Template

50+ Editable Slides to Analyze the Competitive Landscape and Find Opportunities to Win in Your Market
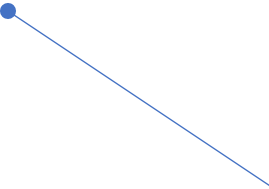
CRAYON

Included in This Template

Part 1: Competitive Landscape Analysis

Part 2: Competitive Intelligence Update
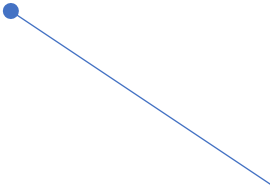
Part 3: Competitive Analysis Resources

Additional tips and instructions are included in callouts like this one.

Make the Most of Competitive Analysis

1. Benchmark Performance

2. Identify Opportunities/Action Items

3. Keep Stakeholders Updated

4. Close the Loop

This full cycle is key for an impactful competitive analysis effort. Where most analyses are lacking is past the first step of benchmarking performance. The most successful companies will identify and drive action items, keep the intel fresh and circulating across the organization, and close the loop on the efforts driven by a competitive analysis. Be sure to complete this cycle to make the most of your competitive analysis.

Part 1:

Initial Competitive Landscape Analysis

Competitive Analysis: Acme Corp.

JANUARY 2017

PREPARED BY JANE DOE

Table of Contents

EXECUTIVE SUMMARY

Competitive Analysis for Acme Corp.

Competitors Included in Analysis

Add competitor logos and group by direct vs. indirect competitor and legacy vs. emerging company.

Key Takeaways

1. Highlight the top takeaways from your analysis, to be detailed in the rest of the presentation.

2. Focus on areas where there are great opportunities for the company to improve – this is how you get leverage from a competitive analysis.

3. Call out areas of strength where the company can double down to go even faster.

4. And call out areas of weakness to identify where the company has not focused but could in order to keep up with competitors.

MARKET

Competitive Analysis for Acme Corp.

Competitors Included in Analysis

Direct

GLOBEX

hooli

soylent
CORPORATION

WONKA

Legacy ———————————————————— Emerging

INITECH

STARK
INDUSTRIES

Indirect
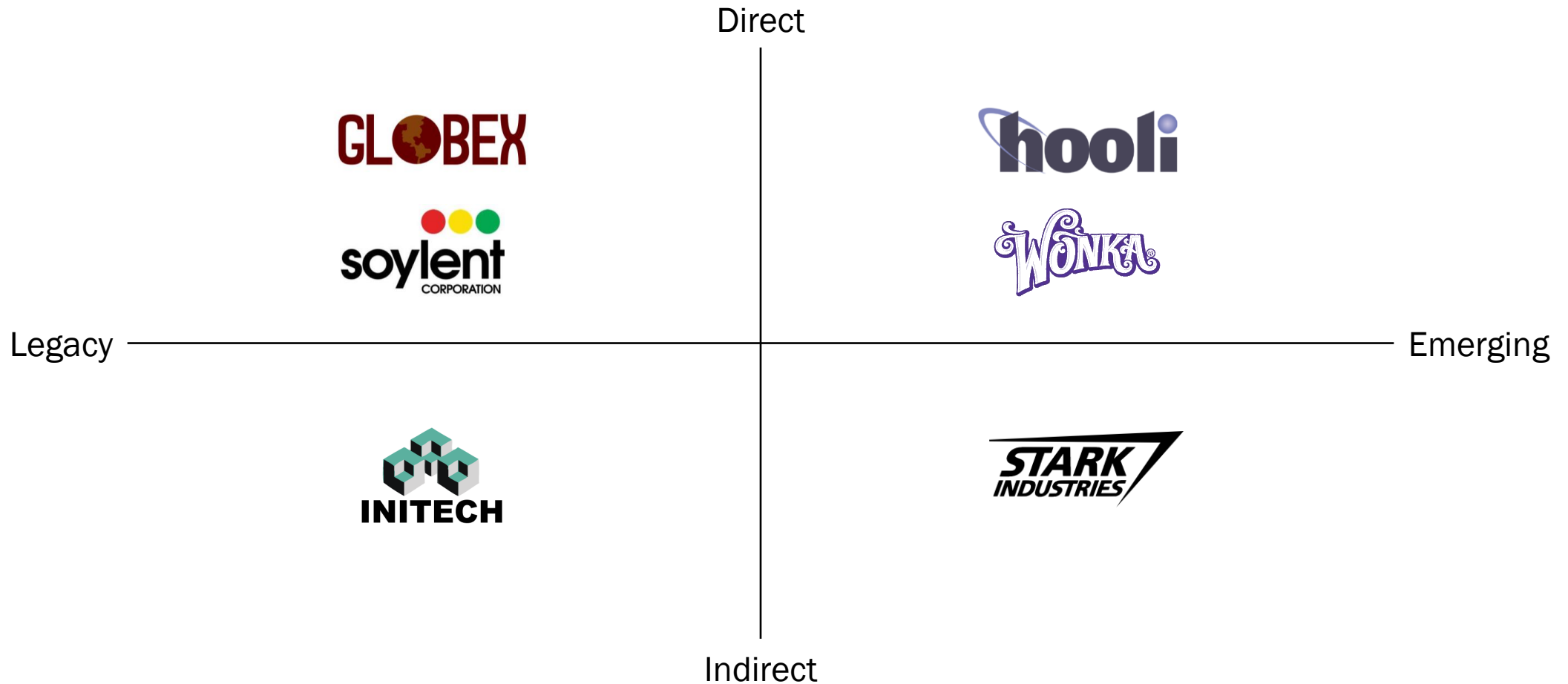
Financial Snapshot

For some comparisons, you may want to have your own company's info side-by-side, but when not relevant/helpful, feel free to skip that line.

	Target Market	Total Funding	Customers	Annual Revenue
Acme Corp.	IT professionals at mid-sized tech co	$50m	10k+	$100m in 2015
Globex	IT professionals in financial, telecom, and tech co	$5b market cap $800m IPO	800k+	$6b in 2015
Soylent				
Initech				
Hooli				
Wonka				
Stark				

Identify financial history and standing from websites like LinkedIn, AngelList, Crunchbase, financial filings & IR pages.

Funding History

Globex	Soylent	Initech
• 2002 - $800m IPO • 1990 - $12m Series A • 1975 - $1m seed		
Hooli	**Wonka**	**Stark**

Financial filings and press pages will have the best data for public competitors, and sites like Crunchbase are a great source of funding history for startups and emerging companies.

Market Share Analysis

Approx. Market Share

Wonka, 0.2%
Stark, 0.2%
Hooli, 0.5%
Acme, 0.3%
Initech, 10.0%
Globex, 26.7%
Soylent, 13.3%
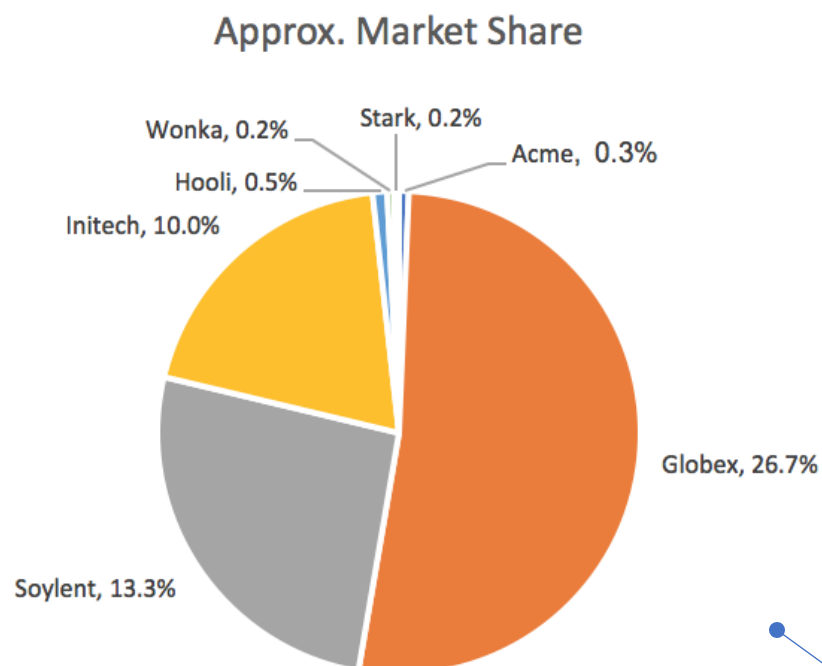
	Customers
TAM	3,000,000
Acme	10,000
Globex	800,000
Soylent	400,000
Initech	300,000
Hooli	15,000
Wonka	7,000
Stark	5,000

Industry reports and public announcements are good sources to feed a market share analysis. It will be approximate, but can give you a sense of relative market share.
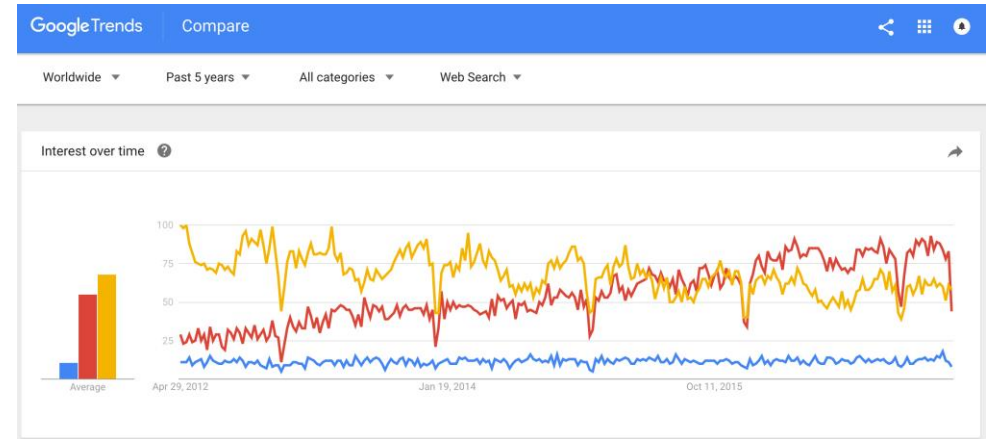
Market Analysis Takeaways

Current Performance

- Summarize how you stack up against the competitors in this analysis category.
- How does our funding and revenue compare to our competitors?
- Are we smaller or larger, more or less efficient with cash?
- Are there certain trends in the market that signal a growth or slow-down?

Action Items

- Identify key action items based on your takeaways.
- Investigate operational optimizations to cut down on costs relative to acquisition.
- [Competitor] is growing rapidly despite their focus on [vertical], investigate opportunity to develop product in that area.

TEAM

Competitive Analysis for Acme Corp.

Team Snapshot

	Founded	Office HQ	Office Locations	Employees
Acme Corp.	2012	Boston, MA	Boston, MA Seattle, WA Austin, TX	450
Globex	1970	Redmond, WA	Redmond, NYC, Austin, London, Berlin, Singapore	~40,000

Compile a team snapshot by pulling information from their company contact pages, their LinkedIn profiles, etc.

Key Executives

GLOBEX

Natalie Jones, CEO
8 years in role, 20 years at company
Experience: operations, telecom

John Baker, COO
4 years in role, 15 years at company
Experience: financial, tech, Oracle

Pat Smith, VP/GM tech vertical
3 years in role, 4 years at company
Experience: tech operations, Initech

Highlight executives relevant for your competitive situation, including leadership in key business units.
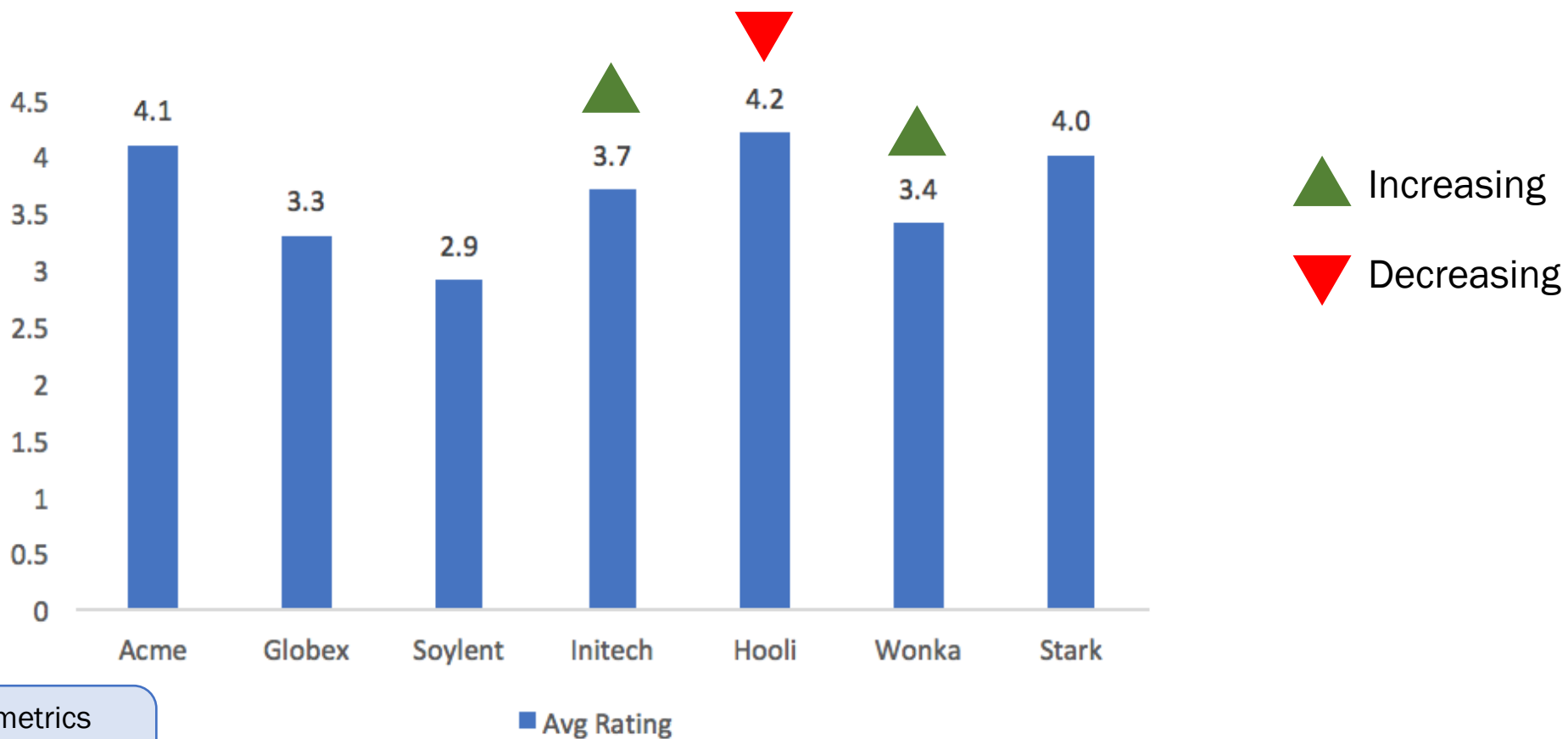
Team Analysis Takeaways

Current Performance

- Summarize how you stack up against the competitors in this analysis category.
- Are we lacking in certain markets? Are we lacking certain expertise on our leadership team?
- Are we ahead of our competition in employee satisfaction?

Action Items

- Identify key action items based on your takeaways.
- Kick off search for leadership in [area of expertise] to level-up our knowledge in that area.
- Develop marketing campaign in [region] to balance out our lack of presence there.
- Research [competitor]'s weakness in [area] surfaced by employee reviews – sales and marketing opportunity.

PRODUCT

Competitive Analysis for Acme Corp.

Pricing & Packaging Overview

	Software (Annual)	Software Details	Services (Annual)	Services Details
Acme Corp.	$10,000-$20,000	Base package $10k Add-ons available, ranging $1k-$4k each	$5,000	Initial setup fee only 24/7 support incl. Online customer portal on-demand
Globex	$100,000+	Custom pricing, typically starts at $100k and increases based on usage, logins, features	$50,000-$100,000	Annual service package $50k+ Incl. phone & email Premium services available $100k+

Catalogue the price points for various products and services packages. If not available on their website, look for these details in third party reviews from customers and prospects.

Feature Comparison

	Feature A	Feature B	Feature C	Feature D	Feature E	Feature F	Feature G	Feature H
Acme Corp.	●	●	●	●	●	○	○	●
Globex	●	●	○	●	●	●	●	●

Dig into feature coverage and note, for each element, if the company has the feature, has partial functionality, or does not have it at all. Leverage information on product pages but also support/help articles and third party reviews. Add detailed notes as relevant.

Product Reviews

	Capterra Reviews	Capterra Avg Rating (out of 5)	Trust Radius Reviews	Trust Radius Avg Rating (out of 10)	Software Advice Reviews	Software Advice Avg Rating (out of 5)	New Reviews Last 3 Months	New Reviews Trend
Acme Corp.	60	4.5	20	8.6	65	4.5	12	Increasing Rating
Globex	31	4.0	170	7.3	100	3.5	10	Decreasing Rating

Third party review sites are a public way to get direct feedback from competitors' customers. Make note of volume of reviews, ratings, and the trend. You may be able to identify new review sites to leverage, strengths and weaknesses.

Product Review Themes

	Positive Themes	Example	Negative Themes	Example
Acme Corp.	Customer Service Innovative Product	"Great customer service – phone calls always get answered and staff is very knowledgeable." (Mar '17)	Reliability Speed	"The product still has bugs and can be slow to load data." (Jan '17)
Globex	Reliability Feature Richness	"Been using this product for years and it still holds up. Very customizable." (Jan '17)	Difficult to Use Outdated	"The product is a decade old, and you can see it. Difficult to do even simple tasks." (Feb '17)

Dig into the qualitative details available in product reviews and share both positive and negative themes. This can uncover positioning material and drive product/service investment.

Product Analysis Takeaways

Current Performance

- Summarize how you stack up against the competitors in this analysis category.
- Are you more or less expensive? Is that a strength or a weakness?
- How do you compare in terms of product functionality?
- Which products/services do customers favor? Who has the greatest customer satisfaction?

Action Items

- Identify key action items based on your takeaways.
- Go deeper in our product strength: recommend further development based on customer reviews.
- Expand product feature development: fill the big gap in [feature area].
- Test new package at a price point not yet offered.

MARKETING

Competitive Analysis for Acme Corp.

Positioning

	Category	Messaging	Tagline
Acme Corp.	IT software	Complete IT management platform with 100+ integrations to suite any org.	IT software to power your tech stack
Globex	IT services & software	Comprehensive and fully integrated IT stack for the cloud and platform services.	The #1 integrated IT stack

Putting key company messaging side-by-side can highlight overlap across companies and identify gaps or opportunities to differentiate. Pull this information from a company's website, in particular their homepage titles and metadata.
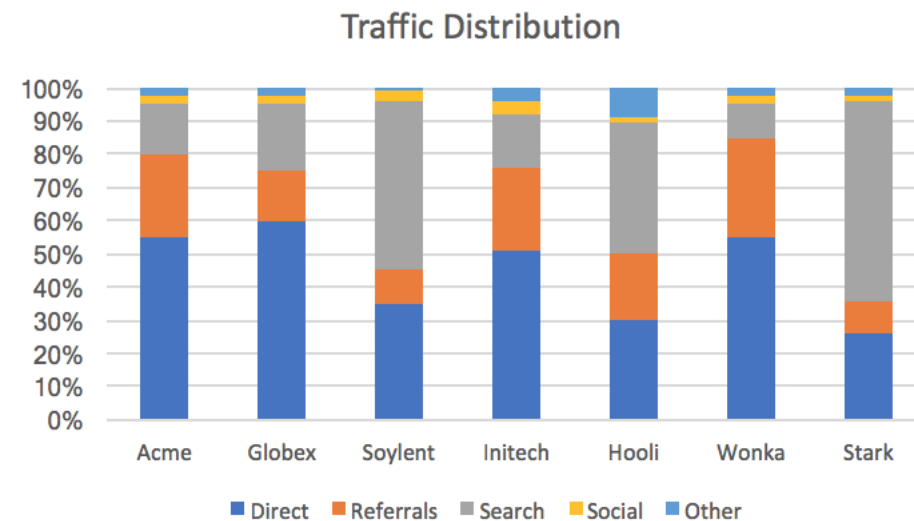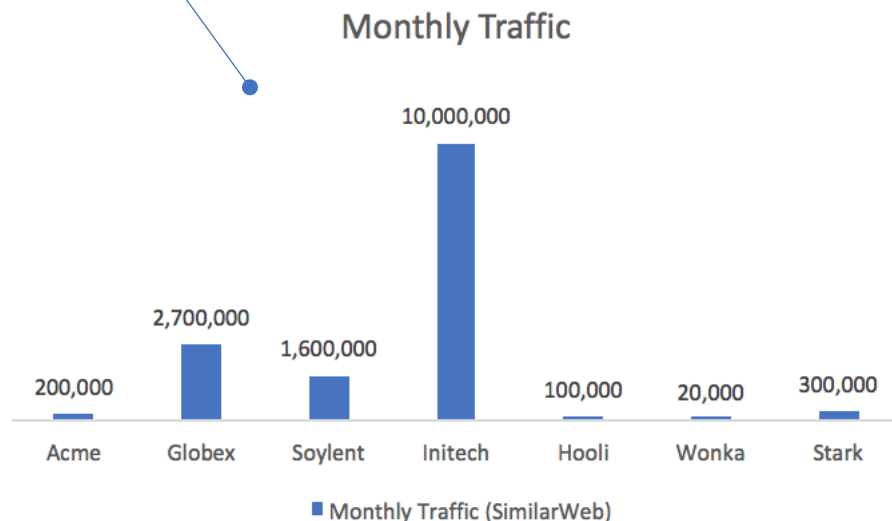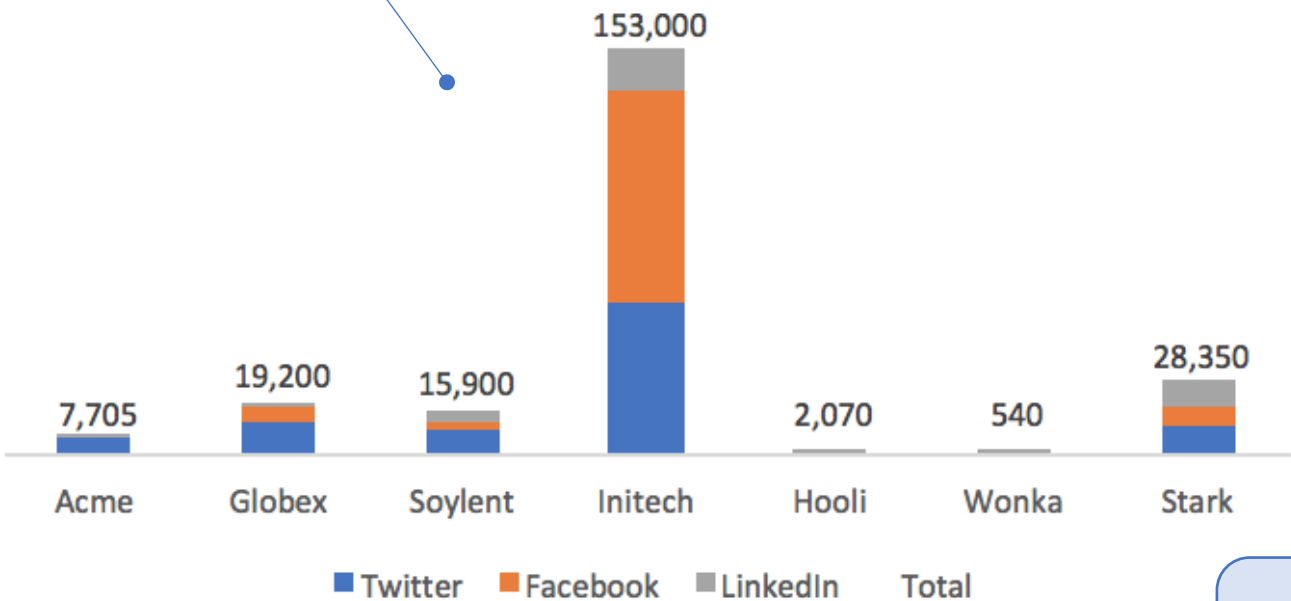
Social Media Reach

Track key social channels on a monthly basis and monitor growth rates. See Excel template supplement for details.

	Twitter	Facebook	LinkedIn	Total	MoM Growth
Acme	6,600	525	580	7,705	4%
Globex	12,600	4,700	1,900	19,200	2%
Soylent	8,900	3,100	3,900	15,900	4%
Initech	57,000	80,000	16,000	153,000	5%
Hooli	825	345	900	2,070	4%
Wonka	400	70	70	540	7%
Stark	10,550	7,800	10,000	28,350	4%

Call out insights and related action items, such as "Initech continues to dominate in social media but it still drives a small percentage of their traffic (see previous slide). Need to evaluate if it's worth investing more effort in growing our social reach."

Keywords & Links

	Organic Keywords	Inbound Links	Top Organic Keywords	Top Referring Links
Acme Corp.	2,000	1,000	acme boston acme IT best IT software IT best practices	Stackoverflow.com Entrepreneur.com Venturebeat.com Medium.com
Globex	5,000	20,000	globex globex services globex careers IT consulting services	Mysql.com Forbes.com Stackoverflow.com Nerdwallet.com

Tools like SimilarWeb, Buzzsumo, and HubSpot can give you details on organic search: keywords and links.

Highlight keyword and link building opportunities, specifically tied to non-brand related keywords.

Content Overview

	Blog	Ebooks/Whitepapers	Videos/Webinars	Audio/Podcasts
Acme Corp.	200 posts Publish 3/week 3,000 subscribers	15+ ebooks Publish 1/month	10+ webinars 1 new webinar/month	-
Globex	500 posts Publish irregularly 2,000 subscribers	10+ whitepapers Publish irregularly	-	~5 recordings of CEO interviews

Compile an overview of content published by each competitor to get insight into their content strategy and where you can surge ahead. See Crayon's Guide to Intel-Driven Content for a much deeper dive into this topic.

CTA/Conversion Points

|	Primary CTA (Homepage)	Top of Funnel Conversions	Middle of Funnel Conversions	Customer or Bottom of Funnel Conversions
Acme Corp.	Free Trial Overview Video	15+ Ebooks 10+ Webinars	Free Trial Demo RFP Request	User Guide Help/Support Videos Upgrade Request
Globex	Find a Reseller Contact Us	10+ Whitepapers	Find a Reseller Contact Us	User Guide Reseller Guide

Identify the main calls to action and conversion points on the homepage and across the website.

Other Key Marketing Programs

	Events	Email	Discounts/Promos
Globex	IT Expo (Mar 2018) Meetups (x6 cities)	Monthly newsletter highlights new whitepapers & upcoming meetups	10% off annual contract Free upgrade to enterprise services package

Identify other key areas of marketing investment to get visibility into how competitors are acquiring customers. Subscribe to their emails, check event pages, and scour their website for this info.

News Mentions

PR Activity Last Quarter
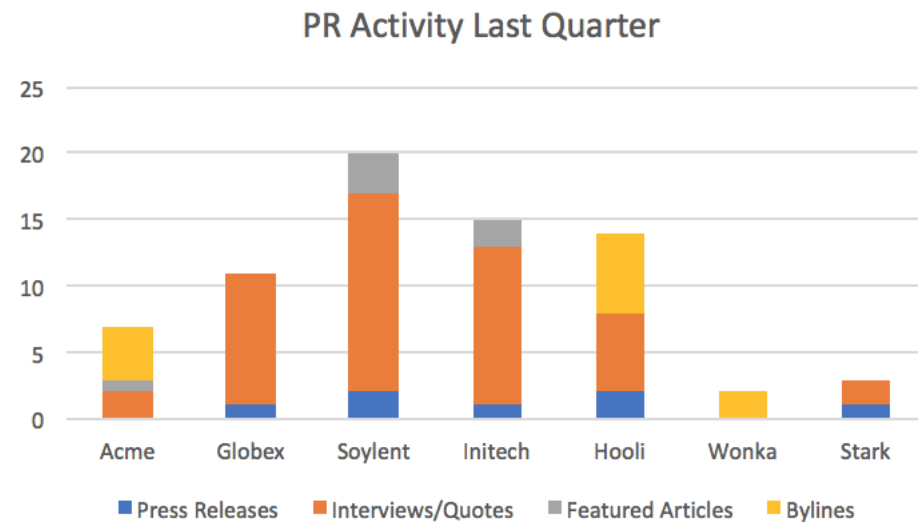
Highlights:
- Acme:
    - Entrepreneur feature
- Globex:
    - ConsumerReport quote
    - Fortune 40 Under 40
- ...

Monitor trends in PR activity, from press releases to news mentions to placed articles. Make note of top coverage.

Tech Stack

	Content Mgmt	Mktg Automation	Analytics	Content/Social	Services
Globex	Drupal	Marketo Optimizely	Google Analytics New Relic FullStory	Facebook Ads LinkedIn Ads Wistia	Zendesk

A company's tech stack can give you insight into where and how they're investing in their efforts across marketing, services, etc. BuiltWith is a free tool that checks a website's code to identify the tools they're using.

Marketing Analysis Takeaways

Current Performance

- Summarize how you stack up against the competitors in this analysis category.
- Are you ahead of behind in terms of marketing efforts?
- Is the messaging differentiated and who stands out?
- Who is winning in terms of traffic, social reach, SEO, content, PR?

Action Items

- Identify key action items based on your takeaways.
- Invest more in an area of marketing opportunity: content, social, search, PR to drive more traffic, leads, or rankings.
- Highlight areas of strength prominently, such as on the homepage
- Reach out to outlets that have recently covered competitors.

SALES

Competitive Analysis for Acme Corp.

Sales Overview

	Customer Count	Geographic Focus	Sales Model	Marquis Customers
Globex	800k+	Worldwide	Channel	Groovefix, Conequon, Medway, Namdax

Are you talking with any of your competitors' marquis customers? Is there an opportunity to expand or focus your sales model based on where your competitors are investing?

Partners & Resellers

	Reseller Count	Key Resellers	Partner Count	Key Partners
Globex	10k+	Global Services Inc, Zenholdings, Runcane	~50	Umbrella Corp, Tamtech, Freshware

If the reseller and/or partner channel is a key strategy in your market, you may want to dig deeper and compare each company's partnerships across different verticals and functional areas. Partnerships can highlight gaps in a company's offerings and/or point to key markets where they are looking to expand.

Sales Win Rate vs. Competitors

Sales Win Rate - 6 Month Summary

Sales Win Rate by Competitor
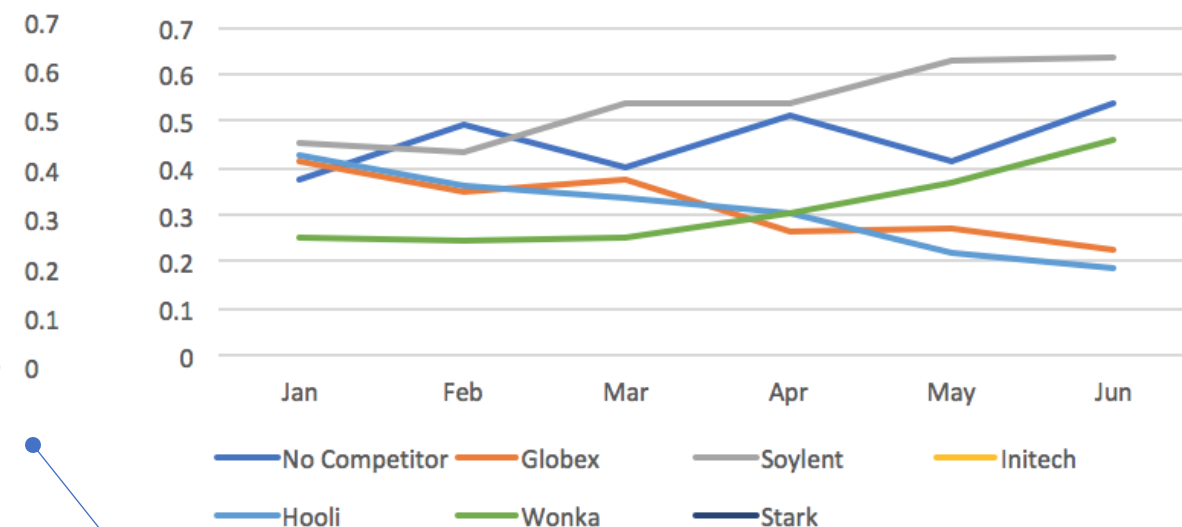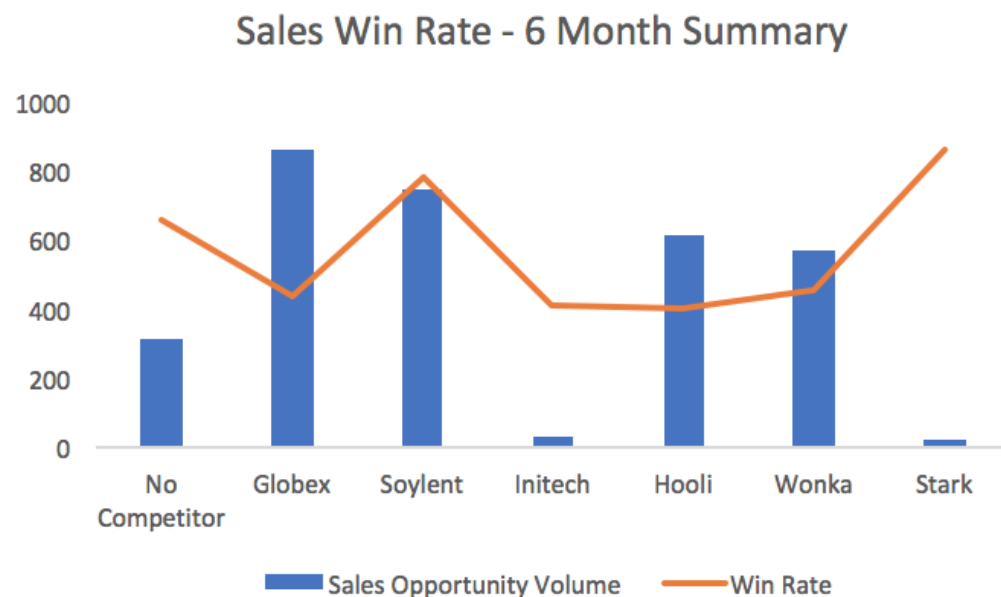
Pull the latest sales win rate data being tracked in your CRM. Every sales opportunity should have a primary competitor noted in order to get this data. Look for overall areas of opportunity and new trends.

Sales Analysis Takeaways

Current Performance

- Summarize how you stack up against the competitors in this analysis category.
- Are you ahead of behind in terms of ramping up acquisition efforts?
- Do you have recognizable marquis customers compared to the competition?
- Where are you winning and where are you losing deals?

Action Items

- Identify key action items based on your takeaways.
- Invest in sales enablement around competitors we're not beating in deals.
- Reach out to potential partners to expand acquisition efforts.
- Create a marketing campaign to reach customers of competitors you're crushing.

Part 2:

Competitive Intelligence Update

Competitive Intel Alert

The key to a successful competitive analysis strategy is staying up to date on the latest intel. Monitor your competitors' moves with a tool like Crayon and disseminate the most important alerts in real-time, coupled with your analysis and takeaways.

[Competitive Update] Globex Announces New Partnership with Initech

- **What Happened:** Globex announced partnership with Initech to serve the non-profit sector.
- **Link to Announcement:** http://www.prnewswire.com/123456/globex-initech-partnership
- **Acme Takeaway:** Globex and Initech are looking to share costs to expand in the non-profit market and gain additional press coverage. This should not impact Acme substantially, since we do not focus on the non-profit sector.
- **Acme Positioning:** Acme is 100% focused on providing the best IT optimization software for the B2B SMB market. Our focus on this market allows us to deliver the best solutions for this industry instead of getting pulled in many directions.

Monthly Competitive Highlights

For less immediate updates, recap your competitors' moves in a monthly update to relevant stakeholders. This can spur ideas and discussion and allow the team to act on the opportunities you highlight.

Hooli ramps up content about "keyword phrase"

- 7 posts last month on "keyword phrase", shifting focus from "old keyword phrases"
- Action Item: relaunch ebook on "keyword phrase"
- Action Item: revamp article on "keyword phrase"

Negative Wonka reviews citing product bugs and speed

- Series of 5 new customer reviews across Capterra & Software Advice citing issues with bugs and speed
- Action Item: present at sales team mtg
- Action Item: "speed test" campaign to highlight our speed

SVP Customer Success replaced at Initech

- Previous SVP Customer Success, Jake Bibari, no longer listed on leadership page
- Action Item: Highlight customer success ratings on website to contrast
- Action Item: Add tech support prompt to sales script

New LP & ad related to "keyword phrase" from Soylent

- Soylent now advertising on "keyword phrase" but ad goes to main contact us request
- Action Item: Repromote our ebook on "keyword phrase" on blog and social

Part 3:

Competitive Analysis Resources

Tools Mentioned in This Template

- Company Profiles:
  - LinkedIn (linkedin.com)
  - AngelList (angellist.com)
  - Crunchbase (crunchbase.com)

- Review Sites:
  - Glassdoor (glassdoor.com)
  - Capterra (capterra.com)
  - TrustRadius (trustradius.com)
  - Software Advice (softwareadvice.com)

- Online Tools:
  - Crayon (crayon.co)
  - Google Trends (trends.google.com)
  - SimilarWeb (similarweb.com)
  - Alexa (alexa.com)
  - HubSpot (hubspot.com, grader.com)
  - Buzzsumo (buzzsumo.com)
  - Builtwith (builtwith.com)

Competitive Analysis Guides

Guide to Competitive Intelligence

Learn techniques for gaining deep insights about your competitors' moves and how to act on them.

[Get the Guide](#)

Guide to Intel-Driven Content

Download the guide and worksheets to complete a deep analysis of your competitors' content strategies.

[Get the Guide](#)

Track Your Competitors' Moves

Get complete competitive insights with Crayon Intel.

✔ Get alerts about product & pricing changes

✔ See changes in messaging & positioning

✔ Monitor the latest customer reviews & forum threads

✔ Stay on top of the latest content published across channels

Request a Demo

Thank You

For more competitive analysis resources, check out crayon.co

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