

Competitive Analysis Guide & Checklist

A competitive assessment provides a detailed and comprehensive description of competitive forces and an assessment of the significance of these conditions to your organization. It should include the following topics and sections:

I. List of Competitors

List the key competitors (and potential competitors, this would include current as well as potential business partners) active in this market segment.

Note: include the predominant sub-segments the competitor covers when completing for a segment.

- Competitor Name
- Principal Lines of Business
- Geographic Coverage
- Size (Revenue)
- Predominant Subsegments

II. Comprehensive Competitor Profiles

Profiles of competitors provide a thorough understanding of key competitive capabilities and performance. Include a separate profile for each major competitor within the market segment.

Includes:

- Vendor Identification
 - Name
 - Address(s) of primary locations, by type
 - Date founded
 - Ownership; parent organization
 - Subsidiaries
 - Trademarks, brand names
- Nature of business
 - Descriptions of lines of business
 - Specific Offerings
 - Other capabilities
 - Leading solutions, products, services
 - Focus market areas (i.e., industry sectors)
- Organization
 - Operating units
 - Key personnel, positions
 - Culture, management style

- Geographic coverage
 - Key locations
- Staffing
 - Number employed, by function, by geography
- Financial performance
 - Revenue
 - By principal line of business
 - By market segment
 - By geography
 - Cost structure
 - Profit
 - Significant investments
- Strategic direction
 - Core competencies
 - Key technologies
 - Development Investment
 - Dollars (\$\$)
 - Skills
 - Research Budget
 - Development Cycle Time
 - Industry, segment focus
 - Recent announcements, investments
 - Announcement Cycle
 - Alliances, joint ventures
 - Business Partner Relationships
 - Anticipated directions, initiatives
- Specific strategies
 - Product/offering strategies
 - Solutions
 - Terms strategies
 - Pricing
 - Terms and conditions
 - Warranty strategies
 - Support strategy
 - Fulfillment strategy
 - Image strategy
 - Distribution strategies
 - Coverage
 - Channels and distribution
 - Communications
 - Promise of Value Assessment and implications to company
 - Key differentiation points
 - Best of breed analysis
 - Strengths and weaknesses
 - Evaluation of recent successes; likely follow-up
 - Evaluation of recent failures; likely responses
 - Assessment of financial condition

III. Competitive Market Performance

This section describes elements of competitor performance and perceptions in the market segment.

Note: complete one table for each competitor listed in section I.

Performance Indicator	Current Year	Current Year - 1	Current Year - 2
Market Segment Position	Occupancy: Installed Base: Market Share:	Occupancy: Installed Base: Market Share:	Occupancy: Installed Base: Market Share:
Business Performance	Customer Acceptance: Revenue: Market share: Profit:	Customer Acceptance: Revenue: Market share: Profit:	Customer Acceptance: Revenue: Market share: Profit:
Attribute Assessment	Image: Brand Awareness: Coverage: Customer Sat:	Image: Brand Awareness: Coverage: Customer Sat:	Image: Brand Awareness: Coverage: Customer Sat:
Resources Deployed	Direct Resources (by type) Channel Resources	Direct Resources (by type) Channel Resources	Direct Resources (by type) Channel Resources
Skill Assessment	Availability: Quality:	Availability: Quality:	Availability: Quality:

IV. Competitive Offering/Solution

Note: This section applicable at Solution/Offering level only.

This section describes and evaluates characteristics of competitor offerings/solutions in each element, and assesses strengths and weaknesses. Relative market position is identified.

If applicable include the elements of APPEALS.

- \$** Price -- customer comparison of price and value
- A** Availability -- customer's complete buying experience
- P** Packaging -- visual evaluation
- P** Performance -- customer comparison of performance and function

- E** Ease-of-Use -- comparisons of ease of use
- A** Assurance -- customer fears and assurances provided by the whole product/service
- L** Life Cycle Cost -- life cycle cost which represents the true cost of ownership
- S** Social Influences -- other sources and standards that influence buying decisions