

COMPETITIVE INTELLIGENCE SELF-ASSESSMENT

Company Name: **Initech, Corp.**

Completed by: **John Doe, Marketing Intelligence Director**

SAMPLE

CI Effectiveness Factor	Self-Assessment Rate 1 (beginner) to 5 (expert)	Impact Level Rate 1 (low) to 5 (high impact)	Comments
<u>Digital Footprint Monitoring</u> <ul style="list-style-type: none"> Map each competitors' online presence Track & surface meaningful changes & connect the dots between multiple datapoints 	1 2 3 4 5	1 2 3 4 5	Currently using google alerts for key terms, check websites ad hoc. Missing a lot of intel from review sites, app stores, content.
<u>Sales Enablement</u> <ul style="list-style-type: none"> Provide timely alerts regarding critical updates Create differentiated positioning & playbooks for competitive scenarios 	1 2 3 4 5	1 2 3 4 5	Robust battlecards but only updated quarterly. Improving sales win rate is key priority, loss to competitors is #1 loss reason.
<u>Company & Product Strategy</u> <ul style="list-style-type: none"> Competitive landscape analysis complete & up-to-date Customer & industry trends surfaced for product management & leadership 	1 2 3 4 5	1 2 3 4 5	Not doing this much today, forwarding key news alerts only. Need to make org. communication changes to enable.



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Campaign Effectiveness <ul style="list-style-type: none"> Expand demand gen programs (e.g. events, social media, promotions) based on competitor activity Reduce competitor campaign impact by out-marketing them with contrasting promotions 	1 2 3 4 5	1 2 3 4 5	<p>Constantly monitoring social media & event activity, missing key promotions.</p> <p>Opportunity to expand promotions & content effectiveness.</p>
Content Differentiation <ul style="list-style-type: none"> Identify the 'white space' to create content that stands apart in the market Drive investment in different channels & formats based on competitor content focus & resonance 	1 2 3 4 5	1 2 3 4 5	<p>Great content team, very prolific & skilled, starting to try new media tests. Content has been a successful strategy for demand gen & branding.</p>
HR/Recruiting Opportunities <ul style="list-style-type: none"> Take advantage of team changes to jumpstart recruiting Recommend employee programs based on reviews 	1 2 3 4 5	1 2 3 4 5	<p>Not leveraging these opportunities today. Employee profile and regions differ enough that this is not a priority.</p>



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