



CRAYON

Guide to Competitive Battlecards

**Win more competitive deals with
intelligent, dynamic battlecards**



Guide to Competitive Battlecards

About Crayon:

Crayon's competitive intelligence platform captures 100+ different types of insights about your competitors automatically in a single platform and gives you the tools and insights to enable your sales team to win competitive deals. Keep tabs on everything from the latest customer reviews to key executive departures to pricing changes and promotions.

Create and distribute dynamic battlecards that allow your sales team to have up-to-date competitive insights at their fingertips. To learn more about how your team can increase sales win rates and beat the competition, request a free demo of Crayon.

[Request a Demo of Crayon Intel Pro](#)

Questions?

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Introduction

The competitive nature of a market impacts a number of aspects within a business. Product teams need to understand competitor activity when developing the product development roadmap. Executive leadership needs to understand competitor movements when making a number of strategic decisions.

Sales is a unique departure from other departments. Salespeople are on the frontline of every organization's battle with the competition and their need for competitive enablement is much more tactical in nature. This is why battlecards have become so popular.

Unfortunately, most battlecards leave much to be desired. The purpose of this guide is to ensure that any battlecards you create are effective and widely-adopted across your entire sales organization. We'll cover every step required to make effective battlecards including intel collection, formatting, measurement, and more.

What are Battlecards?

Why Should I Create Them?

What are Battlecards?

A battlecard is a piece of enablement collateral aimed at helping salespeople overcome [competitive threats at any point in the sales process](#). They are typically created either by the team responsible for gathering and analyzing Competitive Intelligence (CI), or by a sales enablement team in conjunction with a CI or product marketing team.

Battlecards typically take a form that is visually simple to consume, as they're meant to serve as "in-case-of-emergency" lifelines to be used in the midst of a sales call as much as they are preparatory study guides.

What Battlecards Aren't

Most product marketing, competitive intelligence, and sales enablement teams are familiar with competitor profiles, industry/competitive matrices, and other competitive materials. While battlecards are often distilled from these more complete assets, it's important to understand that anything other than a battlecard is typically too in-depth for consumption by sales teams.

Why Create Battlecards?

Alternatively, why refresh your existing battlecards?

Every sales team has one or two top performing reps who win deals at consistently higher than average rates. While many factors contribute to their success, the ability to neutralize competitive threats in a deal is one of the most important. Battlecards ensure that every salesperson, from your most junior Sales Development Representative (SDR) to your most tenured Account Executive (AE), can thwart competitive threats.

When created and maintained properly, battlecards can **boost competitive win rates by 50-60%** (and sometimes more). If that number seems hyperbolic, that's because most companies don't take the right approach when they create battlecards. Most sales teams fail to properly adopt battlecards because they're stale, difficult to consume, don't contain the right intel, or are otherwise unhelpful. The best battlecards are not easy to create and maintain, but the results they produce are much more significant.

"In less than 6 months of using Crayon battlecards, the sales win rate in our most competitive segment has doubled, and the win rate against a top competitor has tripled to 95%"



Alex MacKenzie

Director of Sales at Allego

Before you Start

Excited to get started on your new battlecards? Not so fast.

There are several steps worth taking before diving into the actual creation of your battlecards. First, identify which competitors to focus on for your first few battlecards. You'll also want to identify which team in your sales organization your first iteration of battlecards will support.

Then, ensure you have the proper mechanisms in place to allow you to measure the impact of your new battlecards once they're in place. This process is much easier if your battlecards integrate with your CRM and provide analytics, but can also be done manually.

Finally, begin the process of aggregating any existing intel you already have before embarking on the onerous process of digging up new intel.

**Prioritize
Competitors
and Teams**

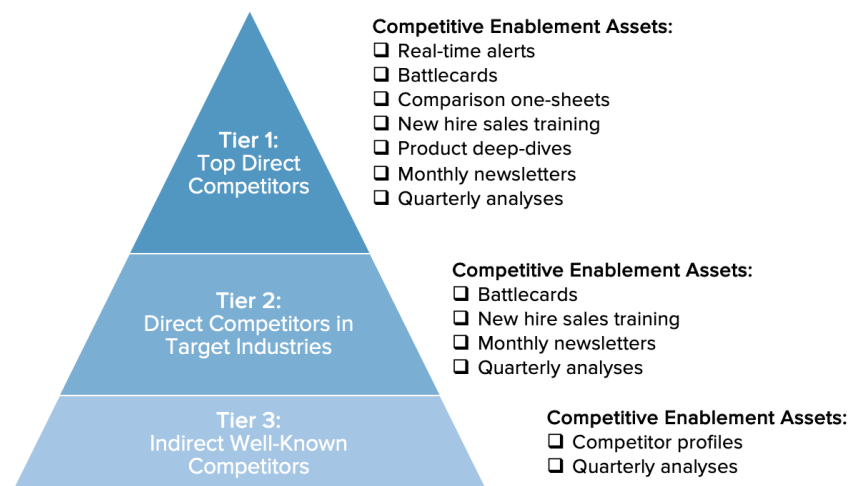
**Establish
Measurement
Mechanisms**

**Aggregate
Intel**

Prioritize Teams and Competitors

It's important to understand who you're creating battlecards for before beginning creation. If your sales team is composed of full-funnel salespeople who cover sales development, closing, and retaining, that's a simple decision. If you have separate sales development, account executive, and account management teams, it's a more complicated decision. If most of your revenue comes from new business, it likely makes the most sense to focus on account executives to start. You can extend your battlecards to the other teams after you've created that foundation (more on that later).

Then, [break down your competitive landscape into tiers](#) of competitors. Start by focusing on one to three of your direct competitors. You can identify those quantitatively with win/loss data in your CRM, or qualitatively by talking to salespeople and asking which competitors they come up against (and lose against) most often.



Establish Measurement Mechanisms

Before embarking on the journey of creating battlecards or any other type of competitive enablement, make sure you have [the proper mechanisms in place](#) to measure their impact. If your organization isn't already measuring competitive win rate, now is a good time to befriend your sales/marketing operations team.

The first step is adding opportunity fields in your CRM that allow sales reps to identify which competitor is present in a deal. Then, add a "loss reason" field as well to ensure you can zero in on deals that were lost to a competitor and not to other reasons like lack of urgency. Once you've established a competitive win rate benchmark, you'll be ready to roll out your battlecards and watch your win rate (hopefully) increase.

Loss Reason ? Lost to Competitor	
Competitor Lost To ? Acme Tools	
Lost to Competitor Reason	Lack of functionality
Lost to Competitor Notes	Acme claimed to have better workflow capabilities

Aggregate Existing Intel

Don't start entirely from scratch if you don't need to! If your organization has already produced competitor analyses/comparisons/matrices, you're in good shape. Provided the information within those pieces of collateral is up-to-date, they should provide a good starting point.

If you aren't so fortunate, don't despair. Sales opportunities in your CRM are a good place to start accumulating some competitive intel. Check notes for qualitative information and any checkbox/dropdown fields with preset win/loss codes or any similar data for quantitative information.

Interviewing a handful of salespeople is also a good way to build a foundation of competitor information. This is a particularly important step for two reasons. First, it pulls the sales team into the process which will help with battlecard adoption down the line. Second, customer-facing salespeople are uniquely positioned to collect intel that others cannot access.

Salespeople with particularly strong customer rapport can often glean valuable insights like pricing, competitor proposals, etc from their customers. You never know what kind of information they might be sitting on that they haven't yet socialized with you.

Creating Battlecards

Now for the moment you've been waiting for (or maybe dreading): creating your battlecard(s). Contrary to common belief, the actual creation of battlecards is not difficult. They don't need to look particularly flashy as they're an internally-facing piece of collateral. The capture and curation of the intel is a difficult step.

First, we'll cover where you can source some of the best types of intel for battlecards. Then, we'll go over the toughest part: [figuring out what to include and what to leave out](#). Finally, we'll cover the basics of formatting battlecards in a way that encourages strong adoption by sales.

Sourcing New Intel

Topics that Pack a Punch

Formatting Basics

Sourcing New Intel

There are endless sources from which you can pull valuable competitive insights. We'll focus on a handful that are particularly valuable for battlecards.

Your competitors' websites are a great source of information and are especially valuable sources to track over time. If you aren't sitting on a treasure trove of existing website evolution data, there are a number of [websites and services](#) that allow you to tap into archives/cached versions of websites.



Read through the content your competitors publish, especially any case studies. These provide a window into their own proof points and key differentiators that their sales team will push. Include pivot points that your sales team can use to steer conversations away from those differentiators and towards your own.

Review sites like G2, Capterra, and Trustpilot are also excellent sources of information. Positive and negative reviews offer insight into competitors' strengths and weaknesses. The weaknesses in particular are easy to weaponize and make great battlecard fodder. You can also occasionally find mentions of pricing and packaging in these reviews.



Online forums can also be an excellent source of information. Reddit, Quora, and other similar forums often have communities focused on topics related to your industry. Search for any mentions of your competition on these sites, as customers tend to be more candid here than other sources of information (like review sites and case studies).

Topics that Pack a Punch

Deciding what to include is one of the toughest parts of battlecard creation. The next step is to distill the vast quantity of raw intel you've gathered from internal and external sources and transform them into concise, meaningful talking points. Ultimately, the topics worth including vary considerably from one organization to another.

General competitor information (location, employees, etc) can be helpful but is often information your sales team already knows. Make sure to keep it brief if you include it.

Kill points are lists of short statements that will help disqualify competitors early on in deals. They provide quick ways to put a competitor in a box that makes it hard for them to establish credibility with a buyer.

Landmines are topics or questions that customers might ask that put your company at a competitive disadvantage. Excellent battlecards will list top landmines to watch out for, along with ways to redirect the conversation to your company's strengths.

Finally, success stories from reps who have beaten the competitor in question are excellent topics, but keep them brief. Even better are stories of companies who your sales team has successfully poached from the competitor in question.


Looking for more battlecard topic inspiration? We wrote [an article on 30+ great topics](#) for sales battlecards and competitor profiles.

Formatting Basics

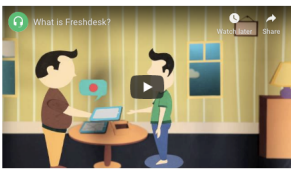
Formatting of battlecards should focus on one goal: ease of consumption. These aren't study guides - they should be able to serve as an in-case-of-emergency lifeline when a competitor pops up in the middle of a discovery call or demo. Try to keep the length to one page. If you have additional information or context to provide on any topic beyond the short blurb in the battlecard, add a hyperlink to an additional document.

Create a highly visual format similar to the one pictured below in which the various types of information have their own distinct tiles/sections. Be sure to label sections clearly. Bullet points are an ideal way to convey information. Any strong callout statistics you have about your product should be bolded or highlighted.

Company Overview - Freshdesk



Founded	2010
Funding	Private: \$241M (Series G)
Revenues	\$145M
HQ	San Francisco, CA
Employees	1,824
Segments / Verticals	Technology, Healthcare, Marketing/PR, Financial Services
Key Customers	Samsung, Cisco, Hyundai, Verizon, LG, CA Technologies, GE, IBM, UCL, Janssen, Abbott, Roche, UCB Pharma, Bristol-Myers Squibb, Pfizer, Johnson & Johnson, Campbell's, Publicis, Adidas, Starcom Mediavest Group, DDB, Edell Lauter, UBS, Commonwealth Bank, Visa, Fidelity Investments, Schroders, Sakant, Bloomberg, IBM



Press Release

Freshdesk • Press Release
Freshworks Jumps Up the Forbes 2019 Cloud 100 List, Continuing Surge of Recognition
[freshworks.com/press-release](#) Sep 17

Freshdesk • Press Release
Freshworks Recognized in Three Gartner Magic Quadrant Reports This Year for Customer...
[freshworks.com/press-release](#) Sep 11

Key Takeaways

Freshdesk is a great **standalone solution** for **traditional** call centers with **simple, standard** processes

- Freshdesk has **weak automation** and **limited integration** capabilities
- Freshdesk has **expensive pricing** for companies with **complex workflows** or **multiple customer-facing teams**

Negative Reviews

Freshdesk • G2 Crowd Review
Freshdesk was given a 1 star review on G2 Crowd
[g2.com/survey/responses/freshdesk](#) Oct 8

Freshdesk • TrustPilot Review
Freshdesk was given a 1 star review on TrustPilot
[trustpilot.com/review/freshdesk.com](#) Sep 26

Freshdesk • TrustPilot Review

Pricing

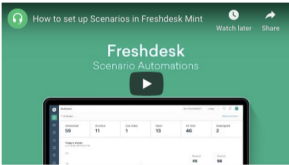
Freshdesk has 5 basic packages from free to large teams. Some key details:

- Support Bot, the feature we compete with the most, is only in the large team packages
- Observer is a close #2 in competitive features and only available in enterprise packages

PACKAGE	STARTS AT	STARTS AT	STARTS AT	STARTS AT	STARTS AT
FREE	\$15	\$29	\$49	\$109	
STARTS AT	STARTS AT	STARTS AT	STARTS AT	STARTS AT	STARTS AT

Landmines

- What happens if you change how your organization works with and supports your customers?
- How many different teams are responsible for making your customers successful?
- What other systems do your customer systems need to talk to?
- Avoid XYZ
- Don't talk about - G2



Saved Search

Freshdesk • Blog Post

Feature Comparison

Feature	Them	Us
Ticketing	☆☆☆☆	☆☆☆☆
Multi-channel Helpdesk	☆☆☆☆	☆☆☆☆
Automation	N/A	☆☆☆☆
Self Service	☆☆	☆☆☆☆
Reporting & Analytics	☆☆☆☆	☆☆

Keep track of conversations

- Team Inbox**
Track and manage incoming support requests from multiple channels. All in one place.
- Agent Outbox**
Track and manage outgoing support requests from multiple channels. All in one place.
- Queue Management**
Assign tickets to agents based on skillset, availability, and other criteria.
- Custom Ticket Status**
Create custom ticket statuses to track the progress of your tickets.
- Scenario Automation**
Automate repetitive tasks and workflows to save time and improve efficiency.
- Customer Responses**
Track and manage customer responses to your tickets and surveys.

Next Steps

The job doesn't end once the battlecards are created! The steps that follow your initial battlecard creation are arguably even more important than everything prior.

Maintenance, extension across the funnel, and measurement of battlecards ensure continued success. Maintenance ensures [continued adoption](#), extension to other sales teams provides additional value for relatively little additional work, and measurement of success makes you look good.

These follow-up steps are neglected by the majority of those who create battlecards and are the reason why so many battlecards fail to make a sustained impact on competitive win rate.

Intel Upkeep

**Extension
Across the
Funnel**

**Measuring
Success**

Intel Upkeep

One of the most common issues salespeople have with battlecards is outdated information. If a sales rep uses your battlecard on a call and gets called out by a prospect for spouting inaccurate/outdated information, trust is not only broken with the prospect, but so is the trust sales had in you. If a deal suffers because of an inaccurate battlecard, you can bet that sales will never use any content—battlecard or otherwise— from you again.

Integrating your battlecards with an ongoing competitive intelligence program will help keep battlecards updated and in sync with market and competitor movements. Make sure to socialize intel updates with sales to continuously build trust and ensure that they keep leveraging battlecards in competitive deals.

Be sure to constantly check up on all of the previously mentioned digital sources of competitive intel to stay on top of changes in the market. While they can't monitor everything, [setting a number of Google alerts](#) can help mitigate the manual time suck for a few sources.

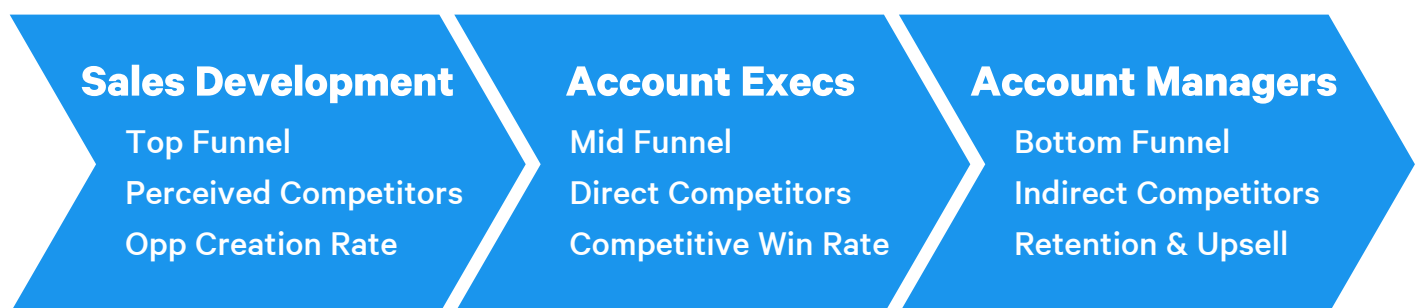
Make sure you also leverage the sales team in keeping intel fresh. Wherever your battlecards live, make sure individual salespeople can call out incorrect intel, add anything valuable they learn in the field, and otherwise interact with the battlecards.

Extension Across the Funnel

Sales functions that occupy other parts of the sales funnel, like sales development and account management, also frequently encounter competitive threats. While they can certainly use the battlecards you've just created in the short term, a better option is to create versions better suited for salespeople who occupy other parts of the sales funnel.

Sales development reps and account managers require very different amounts and types of information when they face competitors. They also may face entirely different tiers of competitors. SDRs frequently encounter perceived competitors early in their prospecting/discovery process. Their [objection handling in those scenarios](#) needs to be incredibly brief as they don't enjoy the level of rapport with their prospects that account executives do.

Account managers face many of the same competitors as account executives when mitigating churn. However, they may also face indirect competitors when their upsell activities threaten to displace existing point solutions.



Measuring Success

The success of your battlecards largely rests on two metrics: usage and outcome. If you're able to, measure the number times salespeople view each battlecard to determine adoption and to get a sense of which competitors require the most enablement.

If you've gotten to this point, hopefully you have some mechanisms in place to [measure competitive win rate](#) over time. A few months of competitive win rate data before rolling out battlecards should suffice as a benchmark. Start measuring competitive win rate month over month using CRM data. Don't stop there!

Tap your middle school algebra skills and calculate the impact of that win rate increase on overall revenue. For example, if your organization generates \$10m of pipeline every quarter and 40% of your deals are competitive, increasing your win rate in competitive deals from 30% to 40% would constitute a \$400,000 increase in revenue every quarter.



Conclusion

Battlecards are the ultimate example of the phrase "you get out what you put in". Nearly every company with a sizable sales team and a handful of competitors has toyed with creating battlecards. Very few companies create properly effective battlecards. For this reason, well-made battlecards are still very much a blue ocean source of competitive advantage.

Strong battlecards require considerable effort, both upfront and ongoing, to establish and maintain their effectiveness. A well-oiled competitive intelligence program, along with a team or individual who can effectively translate competitive intel to meaningful sales insights, is a hugely impactful combination.

Despite the effort required to make them work, battlecards represent one of the most tangible ways for competitive intelligence, product marketing, and/or sales enablement professionals to make a direct impact on revenue.

If you're looking for further best practices on creating battlecards that actually work, [check out the Crayon blog](#) for a number of posts on battlecard adoption, upkeep, topics, and more.

Ready to arm your sales team with actionable competitive intelligence?

Crayon's competitive intelligence platform captures 100+ different types of insights about your competitors automatically in a single platform and gives you the tools and insights to enable your sales team to win competitive deals. Keep tabs on everything from the latest customer reviews to key executive departures to pricing changes and promotions.

Create and distribute dynamic battlecards that allow your sales team to have up-to-date competitive insights at their fingertips. To learn more about how your team can increase sales win rates and beat the competition, request a free demo of Crayon.

[Request a Demo of Crayon](#)



Crayon is a competitive intelligence platform that enables businesses to capture, analyze, and act on market movements from competitors, partners, and customers. Tens of thousands of teams use Crayon's software to capture and analyze a 360 degree view of competitors' activities and enable Sales, Marketing, Product, and Executive Leadership to win in competitive markets.