

Competitive Intelligence Functions

Type	Competitors' Overall Strategy	Competitors' Products & Services Offering	Competitors' Marketing Efforts	Owner
1. Collection & Research:				
a. Product-specific information from secondary sources (Web sites and literature)	✓	✓		Product manager
b. Service-specific information from secondary sources (Web sites and literature)	✓	✓		Product manager
c. Monthly call to sales reps for updates, following up on Closed won/lost report	✓	✓		Product manager
d. Monthly call to client services for updates	✓	✓		Product manager
e. Press releases	✓		✓	Marketing specialist
f. Case studies			✓	TBD
g. Promotions			✓	TBD
h. How they are marketing products/services on Web sites or collateral			✓	TBD
i. Industry magazines for company, products			✓	TBD
j. Email alerts on news			✓	TBD
2. Process & Storage:				
a. Update CI files with updated information per competitors & products		✓	✓	Product manager & TBD
b. Quick assessment of competitor's products/services		✓		Product manager
c. Send out critical information to Sales		✓		Product manager
3. Analysis:				
a. Analyze new information for each affected competitor	✓	✓	✓	Product manager & TBD
b. Integrate with Close won/lost report		✓		Product manager
c. Integrate with Alexa rankings		✓		Product manager
d. Integrate with Opportunity Assessments		✓		Product manager
e. Update existing product side-by-sides comparisons		✓		Product manager
f. Create new product side-by-side comparisons		✓		Product manager

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4. Dissemination/Deliverables:				
a. CI Monthly Report to Executives and Product Management Team: Alexa rankings, Closed won/lost report findings cross-referenced with Opportunity Assessments, and update of new features by competitor by 7 th of each month.		✓		Product manager
b. CI Monthly Report to Sales, Marketing, Client Services, and Executive Team: Update of new features/functionality by competitors, update on promotions, any major changes in our products compared to competitors (see New Features document), anything else TBD thinks should be here, first of the month.		✓	✓	TBD (Product manager to contribute)
c. Quarterly CI Reviews of Key Competitors to Executive Team: Update of new features/functionality by competitors	✓	✓		Product managers
d. Other				