

# FD - P17. Competitive Insights Management

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**NEW / Next release**

R-2314 / Change about massa risus, vestibulum in nunc vitae, sagittis dignissim est.

## 1. Functional Process

### Process Overview

The workstream **Competitive Insight** is part of 'Sales Strategy'. A Competitive Insight summarizes the **market intelligence** gathered from business interactions with the accounts. It helps building the business context in order to better define value propositions to the market.

The purpose of the workstream **Competitive Insight** inside the CRM is to improve the process by allowing all stakeholders to enter and review data inside a single tool. This avoids multiple Excel files shared across teams.

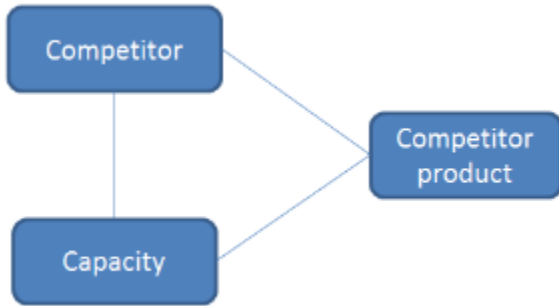
### Sub processes

- **Competitive intelligence non customer related:** the aim of the this process is to collect the maximum of information on competitors, competitors products hierarchies, and their capacities.
- **Competitive intelligence customer related:** the aim is to collect market competitors information for a combination Customer/Product.

## 2. Detailed Process: **Competitive intelligence non customer related**

### 2.1 Data Model & security

## Salesforce object model



All objects are custom objects:

- **Competitor**

This object is dedicated to build a competitors hierarchy as we have for accounts. The hierarchy has two levels: parent competitor/competitor site (as we have corporate group/account). Each type has its own record type. The competitors are shared among GBUs, as we do for accounts.

- **Competitor Product**

This object is dedicated to build a competitor product hierarchy as we have for Solvay product. The hierarchy will have 4 levels:

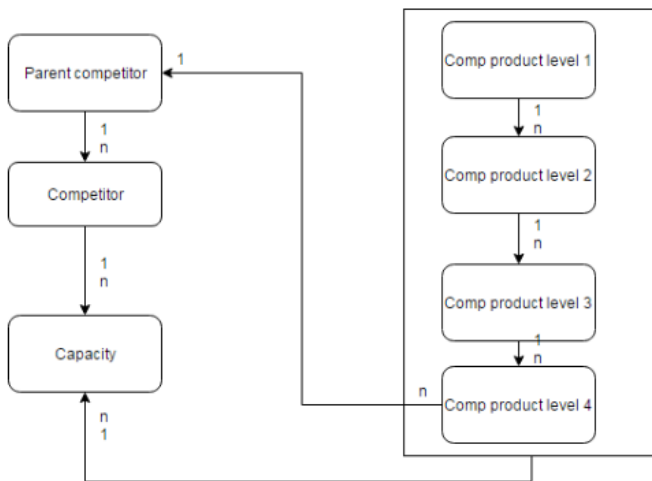
1. Competitor Product Level 1: GBU
2. Competitor Product Level 2: Solvay product level 2
3. Competitor Product Level 3: Solvay product level 3
4. Competitor Product Level 4: Solvay product level 4 or Competitor product (depending on GBUs)

Competitor Products levels 1 to 3 are not linked to competitors. Competitor Products level 4 are linked to a parent competitor.

- **Competitor Capacity**

This object makes the link between a competitor site and a competitor product to store competitive information on Marketable capacity, capacity variation, etc.

## Data Model



## Competitor Visibility and Rights

Who can create?	All the users
Who can see?	All the users can see all the competitors
Who can update?	Only the GBU Data Steward and the System Administrator
Who can delete?	Only the System Administrator can delete

## Competitor Product Visibility and Rights

Who can create?	All the users
Who can see?	All the users can see all the competitor products
Who can update?	Only the GBU Data Steward and the System Administrator
Who can delete?	Only the System Administrator can delete

## Capacity Visibility and Rights

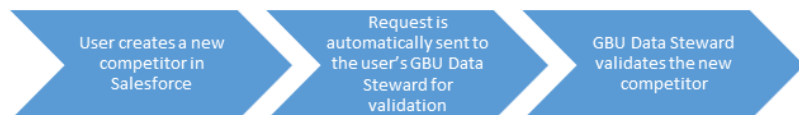
Who can create?	All the users
Who can see?	Users can only see the capacity they created
Who can update?	Users can only edit the capacity they created
Who can delete?	Only the System Administrator can delete a Competitor

## 2.3. Specific rules & automation

### Validation Process

Competitor and competitor product creation can be done by any user. De-duplication rules are set on the name and on the city, and will notify the users in case of any duplicates found but do not block the competitor creation.

Once the competitor/competitor product is created, it is sent for approval to the Data Steward of the GBU:




A picklist "Status" is available on the Competitor page in order to define the status of the Competitor. Following values are available:

- Requested for approval
- Approved
- Rejected

Once validated, the record is locked, and only GBU data steward or system admin can update.

### Competitor Email trigger

Saving a new Competitor record after creation triggers a validation workflow and a request email sent to the GBU Data Steward (Queue defined based on the field "GBU"). The email will contain the following text, and will be sent in the formal Solvay template:



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Dear All,

The following new competitor has been requested in Salesforce. Here are the details:

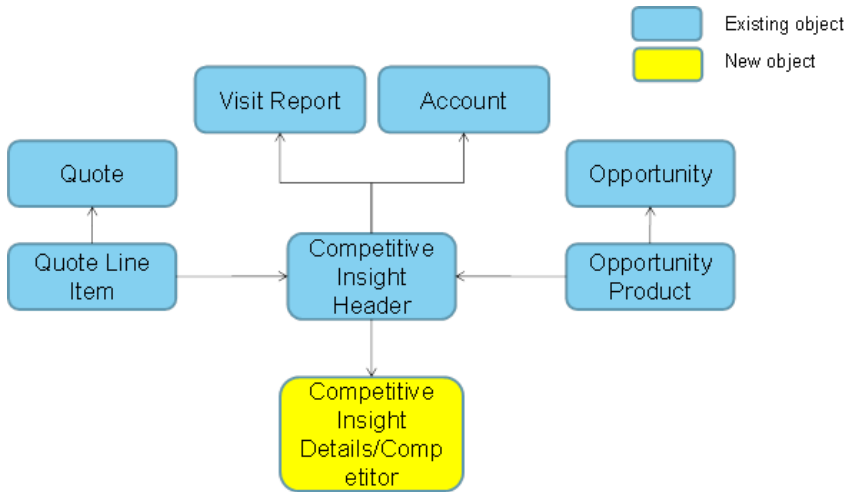
-Competitor Name: Dupont  
-GBU requesting the creation: Performance Polyamides  
Competitor Link: <https://solvay-crm-UAT.cs87.my.salesforce.com/a0n8E000000EarP>

Please approve or reject this request.

### 3. Detailed Process: **Competitive intelligence customer related**

#### 3.1 Data Model & security

##### Salesforce object model



Note: Competitive Insight Header is the same object as Commercial Roadmap Header

We will have 2 different objects for Competitive Insight: one **Header** which stores all common data (for example product and ship to information, Potential), one **Detail** which stores all detailed data per competitors

Competitive Insight header, this object will store these main data:

- Competitive Insight Year
- Ship to account
- Sold to account
- Product
- Sales Previous year data
- Total Potential volume of the customer
- UOM
- Ship to KA

Competitive Insight detail, one line by competitor/product:

- Competitor
- Competitor product
- Estimated Volume
- Estimated Price
- UOM
- Comments
- Created date (workshop)
- Source of information (workshop) mandatory field
- Currency

##### Competitive Insight Header & Detail Visibility and Rights

Who can create?	All the users
Who can see?	Users can only see their data
Who can update?	Users can only update their data
Who can delete?	Only the System Administrator can delete

A sales representative can see and edit only his own combinations (customer/product) corresponding to his sales and his own combinations corresponding to his opportunities (he is the owner). The Commercial Insight data is GBU restricted.

#### 3.1 Bottom-up exercise on the fly

Some GBUs collect competitive insights during a bottom-up review. All sales managers have to complete an Excel sheet, comparing the Solvay Sales with the competitor sales at customer/product level. Competitive insight object allow to perform this in the CRM:

- **Recurrent Business:**

- 1) Headers corresponding to recurrent business are generated using the sales of the previous year, with an extraction of Analytics. Each combination Ship To / Product will correspond to one header.
- 2) For each Header the Total Potential (total volume of the product witch could be sold to the customer) can be filled.
- 3) For each Header, the user can create one or more line of competitive insight detail.

- **Growth Business:**

- 1) At the opportunity creation, a header is generated with the combination Sold To / Product. There is no information on Sales because it's a growth business. If the opportunity product is updated, the header will also be updated.
- 2) The total potential can be set as for recurrent business.
- 3) For each Header, the user can create one or more line of competitive insight detail.

- **Prospect:**

- 1) Headers are created manually with a button on account.
- 2) For each Header the Total Potential can be filled.
- 3) For each Header, the user can create one or more line of competitive insight detail.

## On the fly process

The user goes directly to competitive insight tab. There is a filter section to filter competitive insights headers. In **edit** mode, the user can add or remove competitive insight detail lines, using the dedicated buttons.

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

## From an Account

When the user is consulting an account, he can easily check the competitive insights associated by clicking on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre-filtered on the account.

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

## From a Visit Report

When the user is creating or editing a visit report, he can easily check the competitive insights associated by clicking on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre-filtered on the account of the visit report.

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

## From an Opportunity

~~When the user is creating or editing an opportunity, he can check the competitive insights associated by clicking on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre filtered on the account of the opportunity.~~

~~*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*~~

## From an Opportunity Product

~~When the user is creating or editing an opportunity product, he can easily check the competitive insights associated by clicking on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre filtered on the combination account of the opportunity / opportunity product.~~

~~*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*~~

## From an Quote

When the user is creating or editing a quote, he can easily go to his check the competitive insights associated on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre-filtered on the account of the quote.

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

## From an Quote Line Item

When the user is creating or editing a quote line item, he can easily check the competitive insights associated by clicking on the button *Update Competitive Insight*. This will open a new window displaying all competitive insights pre-filtered on the combination account of the quote/ quote line item.

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

## 4. History

Previously we had an object Competitive Insight designed to store competitive data with mainly text field. We will kill this object as soon as the existing data will be transferred to the new object.

## Lightning

Visibility of components is based on Current User GBU, and compared to CIH GBU.

### Account/Visit report

In CI tab on **Account**, and **Visit report** there is a table of market share by product. The tables are ordered by CIH total potential descending, and filtered on the Account. The user can filter on the Year, using the button "Show Current Year" / " Show Previous year".

- Product: CIH product + CIH total potential
- Detail (Competitor, Estimated Volume, Estimated Price, Incoterm come from the CI detail)
  - CI detail corresponding to Solvay Sales in 1st position.
  - The 3 main competitor CI details ordered by Estimated Volume descending.
  - If there are more CI details, aggregate them in a line "OTHERS" and sum the Estimated Volume.
- Share of wallet: each portion is calculated with "Estimated volume/Total potential"

ACCOUNT / PRODUCT	COMPETITOR	ESTIMATED VOLUME	ESTIMATED PRICE	INCOTERM	SHARE OF WALLET (%)
YEAR: 2017 ZEOSIL 165GR SHIP-TO: CALDIC ITALIA SRL COUNTRY: Italy TOTAL POTENTIAL: 189	SOLVAY	39 T (21%)	EUR 697		
	Evonik	100 T (53%)	EUR 500	EXW	
	Basf	50 T (26%)	EUR 350	EXW	

- Clicking on "Manage CI" you can access the tab Competitive Insights.

## Opportunity

In CI tab of opportunity there are two tables

1st is ~~CI opportunity related~~: for each opportunity product, we display the CI lines associated to the CI header (growth business) linked to the opportunity (Year=Current Year)

2nd is ~~CI region/opportunity product related or region/end use~~ (a switch allows to select the right query)

- ~~Opportunity Product~~ → CIH product
- ~~Opportunity region~~ → CIH Region
- ~~Opportunity Sold To~~ → CIH Sold To
- ~~CIH business type~~ → recurrent business
- ~~CIH year~~ → Current Year OR Previous Year

For each opportunity product, we display the last 5 CI details corresponding, ordered by created date descending (Competitor, Estimated Volume, Estimated Price, Incoterm, created date come from the CI detail).

Competitive Insight - Region/Product related					
ACCOUNT / PRODUCT	COMPETITOR	ESTIMATED V...	ESTIMATED PRICE	INCOTERM	CREATED DATE
YEAR: 2017 ZEOSIL 165GR SOLD-TO: INASEN COUNTRY: Senegal TOTAL POTENTIAL: 120	Evonik	120 T	EUR 500		5 mars 2018

**Note:** Tab Competitive Insights has been removed from the Opportunity record

## Quote

In CI tab of quote there are two tables

1st is **CI Account/quote line item related**: it is the same component as in Account/Visit report but filtered on quote line items.

2nd is **CI region/quote line item related**:

- Quote Line item Product (if level 4) = CIH product OR Level 4 associated to the Quote Line item Product (if level 5) = CIH product
- Quote region = CIH Region
- Quote Sold To <> CIH Sold To
- CIH year = Previous Year

For each Quote line Item, we display the last 5 CI details corresponding, ordered by created date descending (Competitor, Estimated Volume, Estimated Price, Incoterm, created date come from the CI detail).

## Global Interface

The user goes directly to competitive insight tab:

The screenshot displays the 'Competitive Insights' interface. At the top, there is a 'Legal Notice' section. Below it is a 'Filters' section with various input fields for CI Header Name, Year, Product, GBU, Account Region, Business Type, GBU Customer Classification, Account Name, City, Corporate Group, and Owner. A 'Search' button is present. The main section is titled 'Competitive Insights (5+)' and shows a table of insights. The first insight is highlighted in green, indicating it is a '2017 RECURRENT' business header. The table columns include: COMPETITOR, CITY / COUNTRY, COMP. PRODUCT, ESTIMATED VOLUME, ESTIMATED PRICE, INCOTERM, PACKAGING, SOURCE OF INFO., COMMENTS, REPORTING, and CREATED DATE.

COMPETITOR	CITY / COUNTRY	COMP. PRODUCT	ESTIMATED VOLUME	ESTIMATED PRICE	INCOTERM	PACKAGING	SOURCE OF INFO.	COMMENTS	REPORTING	CREATED DATE
SOLVAY	/ BELGIUM		20 T (100%)	EUR 685	FCA		Previous sales		<input checked="" type="checkbox"/>	4.4.2018

1. There is a filter section to filter competitive insights headers (see filter in screenshot above). Click on Search to apply filters.
2. In Competitive Insights section:
  - a. **Edit** button: the user can add or remove competitive insight detail lines, using the dedicated buttons.
  - b. Clicking on the CI Header name, the user can access header details

*Note: Recurrent business headers are displayed in green, growth business headers are displayed in blue, and prospect headers are displayed in orange.*

**Last modifications :**

User	Last Update
<a href="#">Julien Andreoli-ext</a>	2677 days ago
<a href="#">Laura THEOLIER-EXT</a>	2725 days ago
<a href="#">BRAHIM, Walid</a>	
<a href="#">KANJA-ext, Zakaria</a>	
<a href="#">NWANGWU, Daniel</a>	