

zzz [OBSOLETE] P17. Competitive Insights

Training Materials

Presentation

The workstream **Competitive Insight** is part of 'Sales Strategy'.

- [Tutorial videos](#)

Definitions & Objectives

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 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.

Competitive Insights Types

- Recurrent Business
- Growth Business
- Prospect

Process Overview

- Competitor and competitor product creation can be done by any user.

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

[blocked URL](#)

- 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
- The user can access the CI in different ways :
 - go directly to [Competitive Insight tab](#) : he can filter the CI, and add/remove CI detail lines
 - on [Account](#) and [Visit Report](#), the user can find a table of market share by product. He can filter on the previous or current year
 - on [Quote](#), the user can find 2 tables : one is **CI Account/quote line item** related. The other one is **CI region/quote line item** related.

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