

19. Competitive Insights & Competitors

Overview

In this section, you will find information about Competitive Insights, including definition and the process to create a competitive insight. You will also find information about how to create Competitors within Salesforce.



Compliance / Legal Notice : One must never pro-actively ask for or accept detailed information on specific competitors. It is possible to ask/receive general info on competing price levels or terms /conditions if this helps to make a competitive offer. Always report to Solvay's Legal Department if detailed information about a competitor's offer is received or if any organized information exchange via the customer is suspected.



Managing Customer Needs

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Objectives & Values

Competitive Insight : a process of registering and sharing market intelligence obtained from customers as a result of ongoing negotiations. Such info may be registered in SFDC if the source / circumstances in which the data is obtained are mentioned.

Key added value of using Competitive Insights :

- Build a knowledge base on Solvay's competitors by collecting legally compliant information
- Use this knowledge base to price competitive deals, and support win rate

Managing Competitive Insights in the CRM will help you by :

- Improving competitors vision
- Recording all business related information and making it visible (if it's not in SFDC it doesn't exist)
- Enriching data on competitors, their product, their production capacity, their technologies
- Calculating Solvay's market share versus competitors Market share
- Bottom-up collected data with global statistics for future release challenges

Step By Step

Create a Competitor (header)

1 First David searches a competitor's name with the *global search*. If it does not exist yet, he goes to the **competitor tab** and clicks on the **new** button

1 Or, he chooses an existing competitor from the *picklist* and clicks on **continue**

2 David decides to create a new competitor, so he fills all the information and clicks on the **Save** button



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3 David creates a product for this new competitor using the New Competitor Product button

Competitor product should be approved by GBU data steward. Competitor Product name

Competitor
EVONIK

Competitor Detail

Unlock Record Edit Delete Clone Submit for Approval

General Information

Information

| | | | |
|-----------------------------|-----------|-----------------|---------|
| Competitor Name | EVONIK | Street | |
| GBU requesting the creation | Corporate | City | Essen |
| | | Don't know City | |
| | | ZIP/Postal code | |
| | | Country | GERMANY |
| | | Region | EMEA |

Competitor Products

New Competitor Product

No records to display

Competitor Product Edit

New Competitor Product

Save Save & New Cancel

Information

Product Name H2O2 VX 5

Product Code

Level Level 4

Parent Product H2O2 Aseptic Grades

Competitor EVONIK

GBU Slice

Region Available: APAC, EMEA; Chosen:

Product of competitor catalog

Parent product in the hierarchy: here it's a Level 3 corresponding to the product created

could be the same as the corresponding Solaway Product or the real Competitor Product name.

The Competitor's products have the same hierarchy that Solvay's Product but with only 4 levels. Each time you create a product you have to indicate the corresponding parent product.

4 David completes the capacity information by clicking on the **New competitor capacity** button.

The capacity is completed for each competitor product.

Competitor Capacities

New Competitor Capacity

No records to display

Competitor Capacity Detail

Edit Delete Clone

▼ Information

| | | | |
|-------------------------------|--------------------------|--------------------------------|---|
| Competitor Product | H202 L4 | Competitor | None |
| Unit of Measure | T | Owner | Françoise Coussy (Change) |
| Related Capacity | 10,000.00 | Certifications | ISO 9001 |
| Estimated Realistic capacity | 13,000.00 | Estimated Production Cash Cost | EUR 1,000.00 |
| Estimated Marketable capacity | 14,000.00 | Related markets covered | |
| Additional capacity | <input type="checkbox"/> | Date of Capacity variation | |
| Capacity variation | <input type="checkbox"/> | Capacity Variation Details | |

▼ Details

| | | | |
|-------------------------|------------|---------------------|--|
| Date of the information | 30/05/2017 | Process information | |
| Source of information | paper | | |
| Comments | | | |

Create a Competitive Insight

1 First, David needs to *filter* all his Competitive Insight headers by clicking on the **Competitive Insight** tab.

Legal notice:
All market information on Solvay's competition obtained as a result of ongoing negotiations with customers can be registered in the present system. Please note that the source / circumstances in which the data was obtained should be registered. Do not systematically ask for information on competitors that you do not need to make a competitive offer. Do not disclose Solvay's information that is not related to the negotiation especially if you know that the other party will pass this on to competitors. Report to Solvay's Legal Department if you suspect any organised information exchange via the customer.

OK

Filters Search Clear

| | | | | | |
|--------------------------------|-------------------------------|------------------------|-----------------------------|------------------------------|---|
| <small>Corporate Group</small> | <small>Account Region</small> | <small>Product</small> | <small>Account Name</small> | <small>Business Type</small> | <small>Owner</small> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="Françoise Coussy"/> |

Competitive Insights (0 / 0) Edit

i The legal notice is mandatory and informs the user of what is legal or not. Please read it carefully when creating a competitive insight.

2

He then fills in the filters he wants to see : all the corresponding sales or corresponding opportunities appear

Filters Search Clear

Corporate Group Account Region Product Account Name Business Type Owner

Competitive Insights (5/5) Edit

Note: for Soda Ash, Y-1 Volume/ASP are replaced by BFR volume/ASP

| Year | Account Name | Region | Country | City | Product Name | End use | Y-1 Volume (T) | Y-1 ASP (T) | Currency | Total Potential (T) |
|------|--------------|--------|---------|------|------------------------------|---------|----------------|-------------|----------|---------------------|
| 2017 | AAAA | LAM | Brazil | - | #7518 ABRASIVE WM-Q2B 1250KG | | 0,000 | | EUR | 666,00 |

| Competitor Name | Competitor Product | Estimated Price | Currency | Incofem | Estimated volume | UoM | Packaging | Source of Info. | Comments | Created Date |
|-----------------|--------------------|-----------------|----------|---------|------------------|-----|-----------|-----------------|----------|--------------|
| TEST COMPETITOR | azsaze 1/4 | EUR 123,00 | EUR | FAS | 123,00 | KLB | Bulk | 1 | | 2017/05/30 |



- Recurrent business data appear in green
- Growth business data appear in blue
- Prospect data appear in orange

3

David completes the total potential information for the Solvay customer in the header.

Filters Search Clear

Corporate Group Account Region Product Account Name Business Type Owner

Competitive Insights (5/5) Save Cancel

| Year | Account Name | Region | Country | City | Product Name | End use | Y-1 Volume (T) | Y-1 ASP (T) | Currency | Total Potential (T) |
|------|--------------|--------|---------|------|------------------------------|---------|----------------|-------------|----------|----------------------------------|
| 2017 | AAAA | LAM | Brazil | - | #7518 ABRASIVE WM-Q2B 1250KG | | 0,000 | | EUR | <input type="text" value="700"/> |



The Unit of measure is defined in is user preference (Ton or Kilo Pound)

He clicks on the Edit button to complete for each Customer /product combination the Total potential if he knows the information, and clicks on Save.

4

Then he checks the information already filled in and he can add new information for each Recurrent or Growth business by clicking on the Add Competitive Insight button.

| Competitor Name | Competitor Product | Estimated Price | Currency | Incofem | Estimated volume | UoM | Packaging | Source of Info. | Comments | Created Date | Action |
|----------------------|----------------------|----------------------|----------|---------|----------------------|-----|-----------|----------------------|----------|--------------|--------|
| TEST COMPETIT | azsaze 1/4 | 123,00 | EUR | FAS | 123,00 | KLB | Bulk | 1 | | 2017/05/30 | Remove |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | EUR | -No | <input type="text"/> | -tp | -tp | <input type="text"/> | | | Remove |

Add Competitive Insight



- He adds a competitor and a competitor Product and completes all information
- To remove a line, he can click on the Remove Button

Once David has finished completing the information, he clicks on Save. Great! David has successfully created a Competitive Insight.

5

The competitive insight is now available from the **Account page...**

If David wants to capture competitive info but he cannot find corresponding header, he can go to the Account page to *create a new header* by clicking on **Generate Competitive Insight Header** button.

Account
ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Account Detail

Account Information

Account Owner: David Smith (Change)

Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD (View History)

Corporate Group: [None]

Account Record Type: Non SAP Customer (Change)

Partner Type: Prospect

Partner Sub-Type: Sold-to & Ship-to

Phone: +61 401 140 536

Buttons: Edit, Delete, Manage External Account, Convert Prospect To Customer, Manage my Account Team Role, Visit Preparation Report, Update Competitive Insights, **Generate Competitive Insight Header**

6

Sold To and *Ship To* fields are pre-filled, David only has to **select his GBU and the product link** to the competitive insight (Note that there is no restriction on the level).

Commercial Roadmap / Compet. Insight

Competitive Insight Header

Sold To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Ship To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Product level 4: [None]

Year: 2017

GBU: --None--

Category: CI

Business Type: Prospect

Buttons: Save, Save & New, Cancel

Commercial Roadmap / Compet. Insight Detail

Competitive Insight Header

Sold To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Ship To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Product level 4: 18.5% ACTIVE 25-2

Year: 2017

Category: CI

Business Type: Prospect

Buttons: Edit, Delete, Close

Callout: As 'Prospect' is selected, the header generated will be orange

Callout: Fernando clicks on the Account name to go back on the account page

7

...Now when he clicks on the **Update Competitive Insights** button he will see the *new header* he just created.

Account
ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD

Account Detail

Account Information

Account Owner: David Smith (Change)

Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD (View History)

Corporate Group: [None]

Account Record Type: Non SAP Customer (Change)

Partner Type: Prospect

Partner Sub-Type: Sold-to & Ship-to

Phone: +61 401 140 536

Buttons: Edit, Delete, Manage External Account, Convert Prospect To Customer, Manage my Account Team Role, Visit Preparation Report, **Update Competitive Insights**, Generate Competitive Insight Header

Competitive Insights (3/3)

| Year | Sold To Name | Ship To Name | Region | Country | City | Product Name | Total Potential [1] |
|------|---|---|--------|-----------|---------|------------------|---------------------|
| 2017 | ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | APAC | Australia | YERONGA | 18.5% ACTIVE 25- | 2 |

David is now able to log competitive insight information on that combination of **Account /Product**.

8

The competitive insight is also available from the Visit Reports page...

9

...from the Opportunity page...

The button shows all Competitive Insight information linked to this account and this product and created by the user connected

| Year | Account Name | Region | Country | City | Product Name | End use | Expected Volume (€) | Targeted Price (€) | Total Potential (€) |
|------|--------------|--------|---------|-------|--------------|---------|---------------------|--------------------|---------------------|
| 2017 | AAAA | LAM | Peru | ASASA | AFF VANILLIN | | 456,00000 | EUR 123,00 | |

10 ...and from the Quote page & Quote Line Item.

Quote Q-000002885

Quote Detail [Edit](#) [Delete](#) [Clone](#) [Update Competitive Insights](#)

Information

| | | | |
|---------------------|---------------------------|---------------------------------|-------------------------|
| Quote Name | Q-000002885 | Owner | Julien Andrieu (Change) |
| Opportunity | ICL-PP Secondary Supplier | Status | Draft |
| Quote Title | ICL-PP Secondary Supplier | Comments for the Approval | |
| Visibility | Status | Currency | USD |
| BU | Soda Ash & Derivatives | Customer Service Representative | |
| BU | Soda Ash | Back Up | |
| Quote Validity Date | 15/09/2017 | | |

Sold to Account Information

| | | | |
|---------|--------------------------------------|----------------|-----|
| Account | ICL PERFORMANCE PRODUCTS - US OFFICE | Account region | NAM |
|---------|--------------------------------------|----------------|-----|

The button shows all Competitive Insight information linked to this account

Competitive Insights (1/1) [Edit](#)

| Id | Year | Account Name | Region | Country | City | Product Name | Expected Volume (T) | Targeted Price (T) | Total Potential (T) |
|----------------------|------|--------------------------------------|--------|---------------|----------|--------------|---------------------|-------------------------|---------------------|
| Link | 2017 | ICL PERFORMANCE PRODUCTS - US OFFICE | NAM | United States | ST LOUIS | SD NAT | 8 527,62 | USD 165,35 (EUR 137,79) | |

Quote Line Item QL-0000002912 [Customize Page](#) [Edit Layout](#) [Printable View](#)

Quote Line Item History (1)

Quote Line Item Detail [Edit](#) [Delete](#) [Clone](#) [Update Competitive Insights](#) [Mass Clone](#)

Quote Q-0000001617 GBU Aroma Performance

Product AFF VANILLIN Manufacturing plant Code

Other Product name Manufacturing plant

Minimum order quantity Shipping plant code

Packaging Shipping plant

Payment terms 30 Days Internal Comments

Specific Payment Term End Use ACRYLIC MONOMER INHIBITOR

Include in Reporting / Accepted

11 GBU Specificities in the Competitive Insight header for :

Peroxides works with :

• Peroxides

| Year | Account Name | Region | City | Country | Product Name | Plant Origin | Y-1 Volume (T) | Y-1 ASP (T) | Total Potential (T) | |
|----------------------|--------------|---|------|-----------|--------------|--------------|-------------------|-------------|---------------------|-----|
| Link | 2017 | BASF INTEROX H2O2 PRODUCTION NV C/O BASF ANTWERPEN NV | EMEA | ANTWERPEN | Belgium | AQ HG | Svc Ni /Unnc Hert | 106,930 | EUR 25 493,14 | 350 |

| Competitor Name | City | Country | Competitor Product | Estimated volume | UoM | Estimated Price | Currency | Incoterm | Packaging | Source of Info. | Comments | Created Date |
|-----------------|--------------|---------|--------------------|------------------|-----|-----------------|----------|----------|-----------|-----------------|----------|--------------|
| Evonik | Antwerp | BELGIUM | H2O2 35 TLCH | 150,00 | T | EUR 350,00 | EUR | | | visit | | 2017/09/29 |
| BASF | Ludwigshafen | GERMANY | | 100,00 | T | EUR 30 000,00 | EUR | | Bulk | News | | 2017/10/09 |

• Silica

| Year | Account Name | Region | City | Country | Product Name | Y-1 Volume (T) | Y-1 ASP (T) | Total Potential (T) | |
|----------------------|--------------|-----------------------------------|------|-------------|----------------|----------------|-------------|---------------------|--|
| Link | 2017 | AWERY DENNISON MATERIALS U.K. LTD | EMEA | CRAMLINGTON | United Kingdom | TIXOSIL 365 | 15,400 | EUR 3 550,00 | |

| Competitor Name | City | Country | Competitor Product | Estimated volume | UoM | Estimated Price | Currency | Incoterm | Packaging | Source of Info. | Comments | Created Date |
|-----------------|------------|---------|--------------------|------------------|-----|-----------------|----------|----------|-----------|-----------------|----------|--------------|
| STARK | WINTERFELL | IRELAND | Iron Throne | 200,00 | T | EUR 100,00 | EUR | DAP | Packed | House Lannister | | 2017/10/02 |

• Soda Ash

| Year | Version | Account Name | Region | City | Country | Product Name | Packaging | BFR Volume (T) | BFR ASP (T) | Total Potential (T) |
|------|---------|---------------------|--------|------|---------|--------------|-----------|----------------|-------------|---------------------|
| 2017 | BFR03 | TEST SOLDITO SHIPTO | EMEA | CITY | France | | | 13,00 | EUR 10,00 | |

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**Silica
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**Soda
Ash
works
with :**

- BFR Version (3 versions a year)
- Packaging
- BFR Volume & BFR ASP

A new checkbox **"To be included in reporting"** is now available for each Competitive insight detail.

The checkbox is ticked by default.

It allows to track competitor info even if they do not won the market, without impacting reporting.

| Id | Year | Account Name | Region | City | Country | Product Name | Plant Origin | Y-1 Volume (T) | Y-1 ASP (T) | Total Potential (T) |
|----------------------|------|-------------------------------|--------|-----------|---------|----------------------------|--------------|----------------|-------------|---------------------|
| Link | 2017 | BASF DOW HPPO PRODUCTION BVBA | EMEA | ANTWERPEN | Belgium | (AA) Product not known yet | | 0,000 | | |

| Competitor Name | City | Country | Competitor Product | Estimated volume | UoM | Estimated Price | Currency | Incoterm | Packaging | Source of Info. | Comments | Included in reporting | Created Date | Action |
|----------------------|----------------------|----------------------|----------------------|----------------------|-----|----------------------|----------|----------|-----------|----------------------|----------------------|-------------------------------------|--------------|---------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | T | <input type="text"/> | (Euro) | -No | -No | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> | | <input type="button" value="Remove"/> |

CI new header for SAP customer

It is now possible to generate new Competitive insight header from SAP customer accounts.

The business type is set to "Recurrent" by default but can be updated if needed.

Account Detail

Edit | Delete | Manage External Account | Update Document | Sales & Pending Orders | Manage my Account Team Role | Visit Preparation Report

Update Competitive Insights | **Generate Competitive Insight Header**

▼ Account Information

| | | | |
|-----------------------|---|---------------------|--|
| Account Owner | Admin [Change] | Account Record Type | SAP Customer [Change] |
| Account Name | BRENNTAG INGREDIENTS (THAILAND) PUBLIC COMPANY LIMITED [View Hierarchy] | Partner Type | Sold-to & Ship-to |
| Corporate Group | BRENNTAG | Partner Sub-Type | Sold-to & Ship-to |
| Cross GBU Key Account | <input type="checkbox"/> | Phone | 26 895 999 |
| Confidential | <input type="checkbox"/> | Website | |
| WAT Number | | Involved GBU(s) | Novocare; Special Chem; Soda Ash & Derivatives |

▼ Address Information

| | | | |
|---------|---|----------------------------------|--------------------------|
| Address | 1168/98-100 LUMPINI TOWER 33RD FLR , BANGKOK Bangkok (17) 10120 | Corporate Group Approval Ongoing | <input type="checkbox"/> |
|---------|---|----------------------------------|--------------------------|

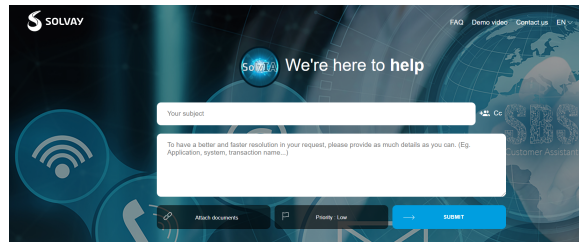
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Related articles

- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Close the Opportunity](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Visit Report: Confidentiality management & Visit report wizard](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example