

# 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

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

Obsolete

Product of competitor catalog

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

Competitor EVONIK

GBU Silica

Region Available APAC EMEA

Chosen

could be the same as the corresponding Solvay 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

EditDeleteClone

▼ Information

|                               |                          |                                |                            |
|-------------------------------|--------------------------|--------------------------------|----------------------------|
| Competitor Product            | H2O2 L4                  | Competitor                     | Owner                      |
| Unit of Measure               | T                        |                                | Franoise Coussey (changed) |
| 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

SearchClear

Corporate Group

Account Region

Product

Account Name

Business Type

Owner

Competitive Insights (0/0)

Edit

 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-02B 1250KG |         | 0,000          |             | EUR      | 666,00              |

| Competitor Name | Competitor Product | Estimated Price | Currency | Incoterm | Estimated volume | UoM | Packaging | Source of Info. | Comments | Created Date |
|-----------------|--------------------|-----------------|----------|----------|------------------|-----|-----------|-----------------|----------|--------------|
| TEST COMPETITOR | azsaze h44         | 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-02B 1250KG |         | 0,000          |             | EUR      | 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 | Incoterm | Estimated volume | UoM | Packaging | Source of Info. | Comments | Created Date | Action |
|-----------------|--------------------|-----------------|----------|----------|------------------|-----|-----------|-----------------|----------|--------------|--------|
| TEST COMPETIT   | azsaze h44         | 123,00          | EUR      | FAS      | 123,00           | KLB | Bulk      | 1               |          | 2017/05/30   | Remove |
|                 |                    |                 | EUR      | -No      |                  | -No | -No       |                 |          |              | 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 Edit Delete Manage External Account Convert Prospect To Customer Manage my Account Team Role  
Visit Preparation Report Update Competitive Insights Generate Competitive Insight Header

▼ Account Information

|                                                                                             |                                                                       |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| Account Owner  David Smith <span>Change</span>                                              | Account Record Type <span>Non SAP Customer</span> <span>Change</span> |
| Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD <span>View Hierarchy</span> | Partner Type  Prospect                                                |
| Corporate Group                                                                             | Partner Sub-Type <span>Sold-to &amp; Ship-to</span>                   |
|                                                                                             | Phone <span>+61 401 140 535</span>                                    |

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 Edit Save Save & New Cancel

Competitive Insight Header

|                                                                 |                                     |
|-----------------------------------------------------------------|-------------------------------------|
| Sold To Name  ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | GBU <span>--None--</span>           |
| Ship To Name  ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | Category <span>CI</span>            |
| Product level 4 <span>18.5% ACTIVE 25-2</span>                  | Business Type <span>Prospect</span> |
| Year <span>2017</span>                                          |                                     |

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

Commercial Roadmap / Compet. Insight Edit Delete Clone

▼ Competitive Insight Header

|                                                                 |                         |
|-----------------------------------------------------------------|-------------------------|
| Sold To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | Category: CI            |
| Ship To Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD | Business Type: Prospect |
| Product level 4: 18.5% ACTIVE 25-2                              |                         |
| Year: 2017                                                      |                         |

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

▼ Account Information

|                                                                                             |                                                                       |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| Account Owner  David Smith <span>Change</span>                                              | Account Record Type <span>Non SAP Customer</span> <span>Change</span> |
| Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD <span>View Hierarchy</span> | Partner Type  Prospect                                                |
| Corporate Group                                                                             | Partner Sub-Type <span>Sold-to &amp; Ship-to</span>                   |
|                                                                                             | Phone <span>+61 401 140 535</span>                                    |

Competitive Insights (3/3) Edit

| Year | Sold To Name                                      | Ship To Name                                      | Region | Country   | City    | Product Name      | Total Potential (€) |
|------|---------------------------------------------------|---------------------------------------------------|--------|-----------|---------|-------------------|---------------------|
| 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...

Accounts Contacts Activities **Visit Reports** Account Plans Cases Opportunities Cross BU Leads + ▾

Visit Report **sdqsd**

Customize Page | Edit Layout | Printable View | Help for this P

Show Feed

Back to List: Visit Reports

Competitive Insights | Customer Contacts | Products | Opportunity Links | Visit Report Team | Cross BU Leads | Activity History | Open Activities | Visit Report History | Google Docs, Notes, & Attachments

Visit Report Detail

Edit Delete Clone Sharing Send Report Internally Send Report to Customer

**Update Competitive Insights**

Information

9 ...from the Opportunity page...

Opportunity Product **AFF VANILLIN for AAAA**

Edit Layout | Printable View | Help for this Page

Back to List: Users

Opportunity Product Detail

Edit Delete Update Product Back to Opportunity New End Use Request Synchronize with Commercial Roadmap **Update Competitive Insights**

Opportunity Product Information

Product Code 90070555 Opportunity AAAA



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

Competitive Insights (1/1) Edit

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

First Last

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

Quote Q-0000002885

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

▼ Information

|                     |                           |                                 |                                                        |
|---------------------|---------------------------|---------------------------------|--------------------------------------------------------|
| Quote Name          | Q-0000002885              | Owner                           | <a href="#">Julien Andreoli</a> <a href="#">Change</a> |
| Opportunity         | ICL-PP Secondary Supplier | Status                          | Draft                                                  |
| Quote Title         | ICL-PP Secondary Supplier | Comments for the Approval       |                                                        |
| Visibility          | Shared                    | Currency                        | USD                                                    |
| GRU                 | 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) |
|----------------------|------|--------------------------------------|--------|---------------|----------|--------------|---------------------|-------------------------|---------------------|
| <a href="#">Link</a> | 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) |
|---------------------------|-------------------------------------------------------|--------|-----------|---------|--------------|---------------------|----------------|---------------|---------------------|
| <a href="#">Link</a> 2017 | BASF INTEROX H2O2 PRODUCTION NV C/O BASF ANTWERPEN NV | EMEA   | ANTWERPEN | Belgium | AQ HG        | Siv Ni / Uninc Hort | 106,930        | EUR 22 493,14 | 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 TUCH       | 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) |
|----------------------|--------------|-----------------------------------|------|------------|----------------|----------------|-------------|---------------------|
| <a href="#">Link</a> | 2017         | AVERY DENNISON MATERIALS U.K. LTD | EMEA | CRAMINGTON | United Kingdom | TIKOSIL 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 SOLD TO SHIPTO | EMEA   | CITY | France  |              |           | 13,00          | EUR 10,00   |                     |

- Plant Origin
- Y - 1 Volume & Y - 1 ASP

Silica works with :

- Y - 1 Volume & Y - 1 ASP
- N o plant origin

Soda Ash works with :

- B F R V e r s i o n ( 3 v e r s i o n a y e a r )
- P a c k a g i n g
- B F R V o l u m e & B F R A S P

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)  |                      |                                     |              |                        |
|-----------------------------------------|----------------------|-------------------------------|----------------------|----------------------|---------|----------------------------|--------------|----------------|-------------|----------------------|----------------------|-------------------------------------|--------------|------------------------|
| <a href="#">Link</a>                    | 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"/> |              | <a href="#">Remove</a> |
| <a href="#">Add Competitive Insight</a> |                      |                               |                      |                      |         |                            |              |                |             |                      |                      |                                     |              |                        |

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                                                                                                                                                                                                                                       |                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <div>Edit   Delete   Manage External Account   <b>Update Request</b>   Sales &amp; Pending Orders   Manage my Account Team Role   Visit Preparation Report</div> <div>Update Competitive Insights   <b>Generate Competitive Insight Header</b></div> |                                                                                                                    |
| ▼ Account Information                                                                                                                                                                                                                                |                                                                                                                    |
| Account Owner  Admin <a href="#">[Change]</a>                                                                                                                       | Account Record Type SAP Customer <a href="#">[Change]</a>                                                          |
| Account Name BRENNTAG INGREDIENTS (THAILAND) PUBLIC COMPANY LIMITED <a href="#">[View Hierarchy]</a>                                                                                                                                                 | 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                                                                                                            |
| VAT Number                                                                                                                                                                                                                                           | Involved GBU(s) Novocare; Special Chem; Soda Ash & Derivatives                                                     |
| ▼ Address Information                                                                                                                                                                                                                                |                                                                                                                    |
| Address 1168/96-100 LUMPINI TOWER 33RD FLR , BANGKOK Bangkok (17) 10120 Thailand                                                                                                                                                                     | Corporate Group Approval Ongoing <input type="checkbox"/>                                                          |

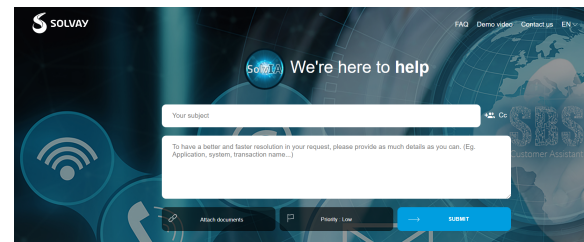
[Back to the top](#)

## 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/>



The image shows a web form for submitting a support ticket. At the top, it says 'SOLVIA We're here to help'. Below this is a text input field labeled 'Your subject'. Underneath the input field is a smaller text box with the instruction: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)'. At the bottom of the form, there are two buttons: 'Attach documents' and 'SUBMIT'. The 'SUBMIT' button is highlighted in blue. The background of the form features a globe and various icons like a Wi-Fi symbol and a magnifying glass.

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