

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

No records to display

New Competitor Product

Competitor Product Edit

Save Save & New Cancel

Information

Product Name H202 VX 5

Product Code

Level Level 4

Parent Product H202 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 Cousy (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	☐	Date of Capacity variation	
Capacity variation	☐	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 (Change)	Account Record Type Non SAP Customer (Change)
Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD (View History)	Partner Type Prospect
Corporate Group	Partner Sub-Type Sold-to & Ship-to
	Phone +61 401 140 535

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 --None--
Ship To Name ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD	Category CI
Product level 4 18.5% ACTIVE 25-2	Business Type Prospect
Year 2017	

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 (Change)	Account Record Type Non SAP Customer (Change)
Account Name: ADJUVANT TECHNICAL AND MARKETING SERVICES PTY LTD (View History)	Partner Type Prospect
Corporate Group	Partner Sub-Type Sold-to & Ship-to
	Phone +61 401 140 535

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	Julien Andreoli Change
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)
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	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 JS 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)
Link	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 p l a n t o r i g i n

**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)				
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
					T		Euro	-No	-No			☒		Remove
Add Competitive Insight														

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 Demos	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	☐			Phone	26 895 999			
Confidential	☐			Website				
VAT 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	☐			

[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/>

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