



SERVICE**MAX**

# Launch Your CI Function with a 30-60-90 Day Plan

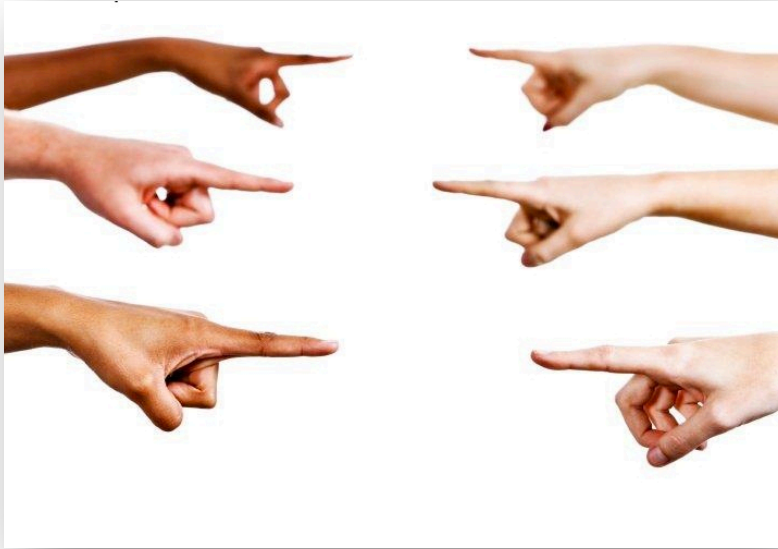
Tracy Berry  
Sr. Competitive Strategy Manager  
ServiceMax

## **Planning & Execution**

- 30-60-90-day plan
- “30-in-30” interviews
- CI tools & techniques

## **Where Are We Now?**

**Poll #1: Why are you  
joining us today?**



**Group Effort:**  
It's everybody's job  
and nobody's job



**The FYI Trap:**  
More "information" doesn't  
always help



**Content Control:**  
Out of date or incorrect  
information can be more  
harmful than no  
information







- Can Do vs. Will Do attitude
- Intellectual curiosity
- Strategically insightful
- Able to engage at the Front Lines



Transitioning from a reactive to a proactive organization is achievable with the right resources in place

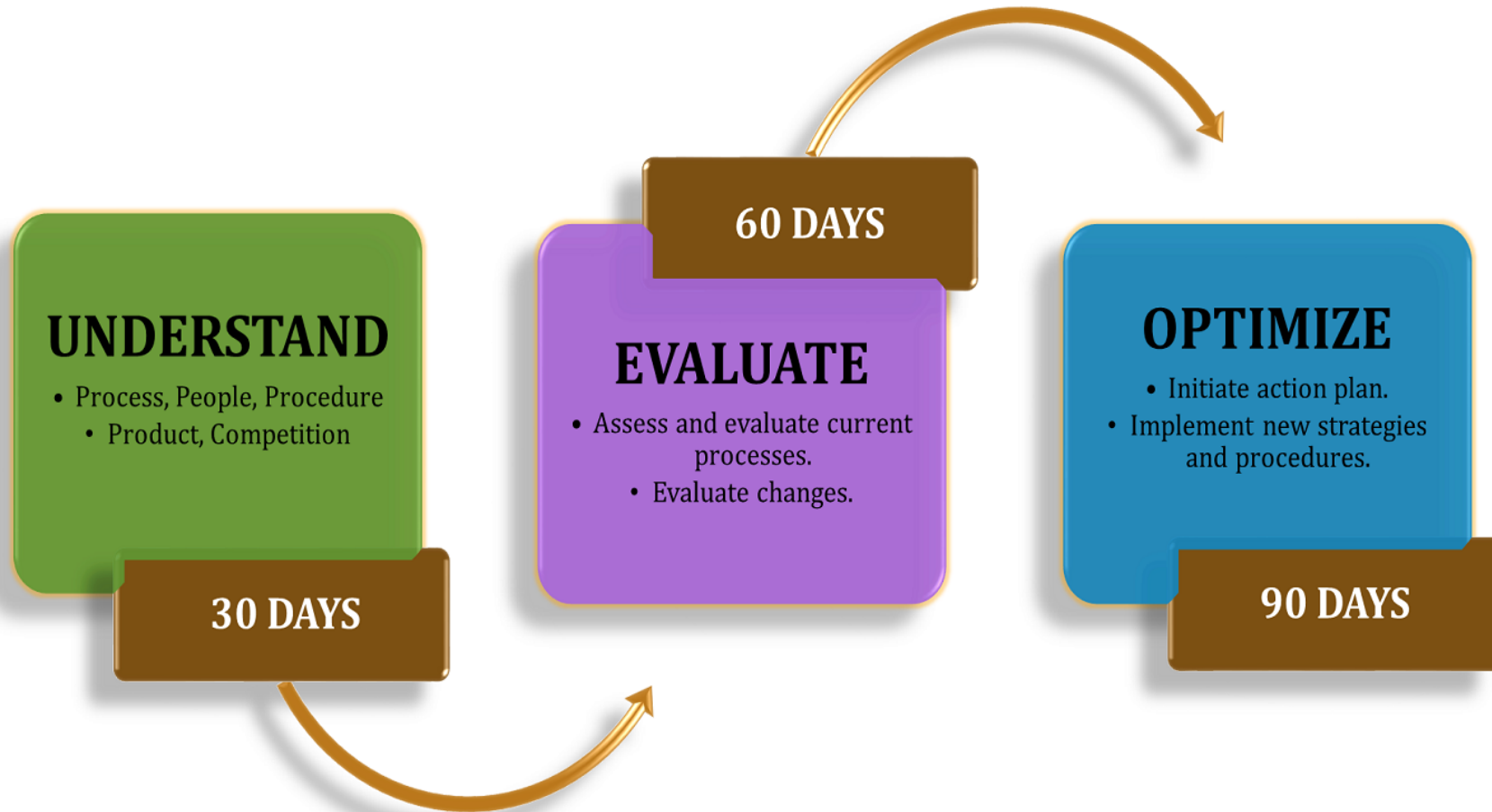
	Minimal	Basic	Intermediate	Advanced	Expert
	Reactive		Proactive		Strategic
Staff	1 Part time employee	1-2 Part time employees	1-2 Full time employees	3-4 Full time employees	5+ Full time employees
Budget	Non-existent to Small	Small \$500K	Small to Medium	Medium \$1.5M to \$2M	Large \$10M
Resources	Secondary Searches	Secondary with research library	Secondary Software & Vendor relations	All previous mentioned tools	All previous mentioned tools
Research Product	Ad-hoc request	Structured monitoring and regular reporting	Forecasts trends that will impact the market	Independently identifies areas of research	Formerly develops strategy
Reach	Limited to a single business unit	Responds to business unit requests	Regularly serves multiple business units in company	Regularly engages with C-Suite	Represented with a leader in the C-Suite

Source: SCIP Webinar by FletcherCSI ["Setting Up the CI Function"](#)

# **Poll #2: What is your role in CI?**



# Hitting the Ground Running: Launching the Competitive Strategy Function





## Necessary Stuff

- Training & onboarding
- Industry crash course
- Internal University coursework



## Quick Wins

- Begin a competitor profile
- Initiate “30-in-30” interviews
- CI evangelizing



## Fun Stuff

- Site visits
- Deal strategy calls
- Informal discussions on internal state of CI



## Complete “30-in-30” interviews

- Identify CI strengths and gaps
- Use findings to map out CS function



## Map out the CS function

- Map the existing flow of competitive information
- Separate tactical from strategic requirements
- Articulate priorities
- Determine what intelligence to collect, how to collect it, where to store it and how to share it



## Tools assessment

- Evaluate solutions providers' products and services around:
  - News aggregation
  - Competitor monitoring
  - Website updates
  - Battlecards
  - Scenario analysis
  - Win-Loss analysis
  - Trade show monitoring



## Other Activities

- Sales Enablement webinar – Competitor Profile
- End of quarter Win/Loss Review

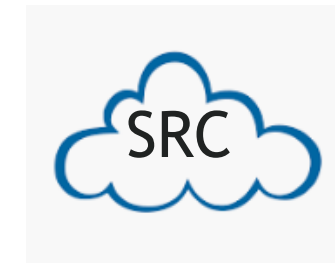
## *Thirty(ish) 30-minute interviews with CI stakeholders*

- What is your history of CI in the context of your role?
- What is working?
- What is confusing?
- What is broken?
- What is missing/wish list?
- Off the record: If you had a magic wand, where would you wave it?
- Consumption preferences and frequency of deliverables



**Interviews**





Fair amount of  
CI in internal  
Sales  
Resource  
Center



Use of Chatter  
Searchability



CI sessions at  
Sales Kick-Off

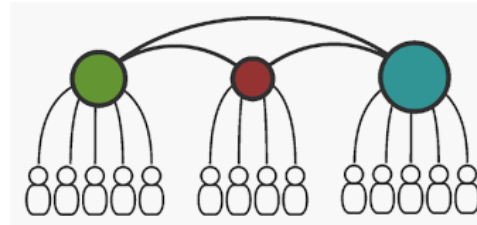


Accessibility and  
responsiveness  
of CI "team"



# Differentiation

- N n
- Not current
- Does not go beyond product
- Needs to be specific to each competitor



# Decentralized CI

- W
- CI
- How do we drive people there?
- Where do I go for CI?
- What version is current?
- Information delivered one-way
- No process for getting CI from sales
- Lack of collaboration
- Not using CRM platform

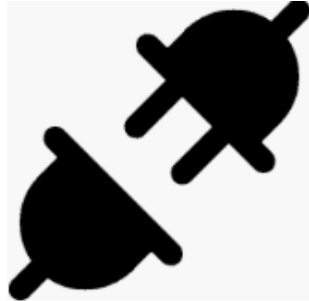


## Internal Messaging

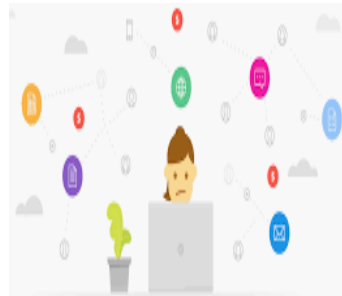
- CI is outdated – lose credibility
- Big disconnect between marketing output and sales experience
- Gaps in CI = sales lacks the right information to compete in a deal
- The MQ should not be the primary source for building positioning statements
- Information is not very consumable



CI is only requested late in a not lead to strategy sales deal



Information does



Too many tools;  
content is  
everywhere



Win/loss data in  
CRM is dirty  
and unreliable



Organization is  
reactive to  
competitive  
insights – too little  
too late



## CI

- Deeper analysis of competitors
- Cadence for sharing CI
- Need to evangelize CI
- Competitor GTM strategies
- CI central repository
- “One tool to serve them all”



## Sales Enablement

- Competitor SMEs
- Mandate CI reviews at critical decision stages
- Build best practices for engaging competitors
- Landmines – set and defend
- “How to Win Against XYZ” sales guide
- Mobile accessibility to CI



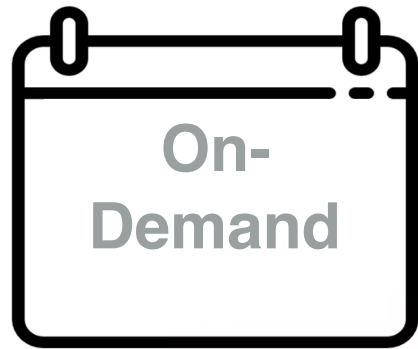
## Customers & Partners

- Use partners to gather CI
- Leverage partners to show our competitive strengths
- Quarterly reviews with partners
- How do our customers measure success?
- We don’t know what deals we aren’t being invited to

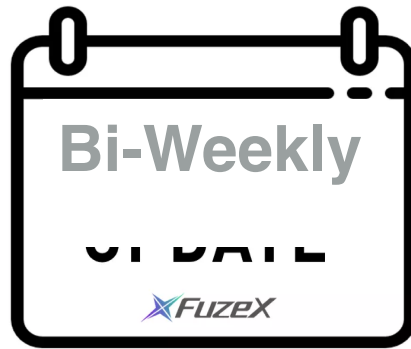


## Strategy/Other

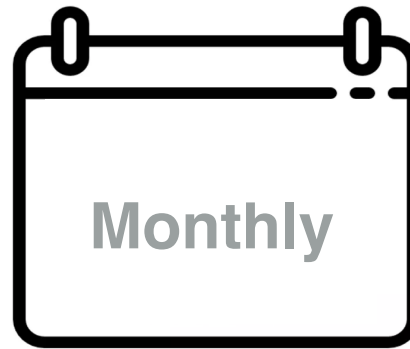
- No set of long- and short-term KPIs
- CS needs direct access to strategic meetings and reviews
- No one is in charge of strategy
- Need competitive insights before going into new markets
- Build strategic early warning capability



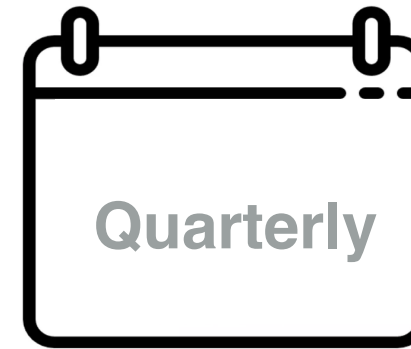
- CI portal
- Battlecards
- Dashboards



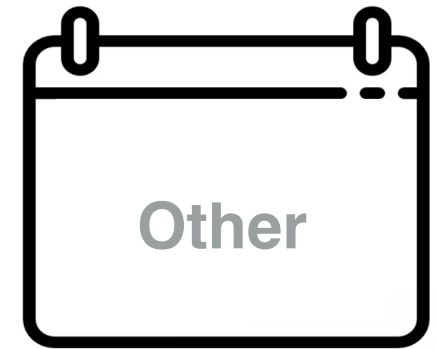
- Newsletter with editorial



- 30-minute webinars on how to beat the competition
- Competitor updates
- Enablement session to review new CI products, updated documents



- Win/Loss newsletter
- CI partner reviews



- Watchlists with customized email alerts
- Competitor profiles (3x year for primary; 2x year for secondary)
- Sales enablement calls





**Interviews**

## **Five CI Requirements**

1. Focus on True Differentiation
2. Centralize Competitive Intelligence Content
3. “Sugar-free” Internal Messaging
4. Timely Win/Loss Analysis and Reviews
5. Reactive to Proactive Insights



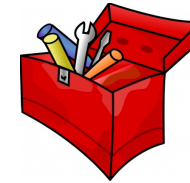
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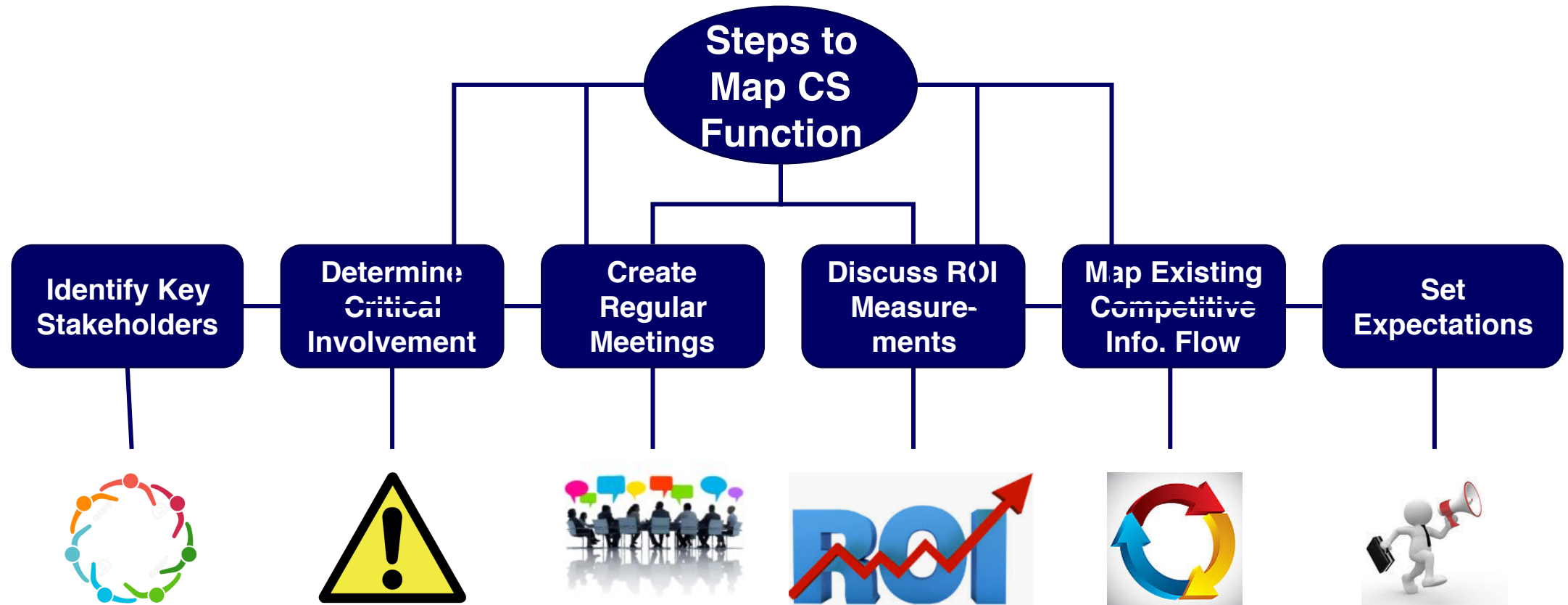
## Tools assessment

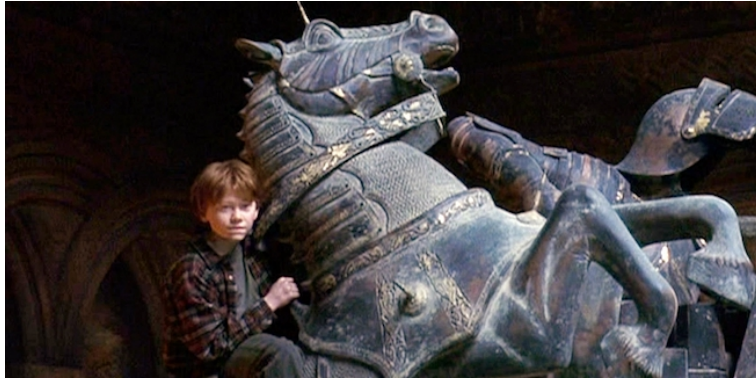
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## Other Activities

- Sales Call – Competitor Profile
- Q3 Win/Loss Review





## Tactical

- Account executives
- Sales enablement
- Solutions engineers
- Product marketing
- Inside sales
- Professional services



## Strategic

- Executive leadership
- Sales leadership
- Product management
- Partner/Alliance program
- Board



## Tactical & Short-Term

### Sales Enablement

- True product differentiation at the feature and function level
- Differentiation beyond product

### Centralized CI

- Instill a collaborative environment
- Enable cross-functional CI

### Communication

- Timely and reliable messaging about competitors
- Demand for CI at a regular cadence

## Strategic & Long-Term



### Grow a culture of CI within ServiceMax

- Enable sales and other internal customers to be the eyes and ears for competitive information

### Become Proactive

- Use competitive insights to move from reactive to proactive decision making

### Win/Loss Analysis

- Insight to understand, predict and respond to changes in our performance and fine-tune strategy





When considering  
entering a new or  
emerging market



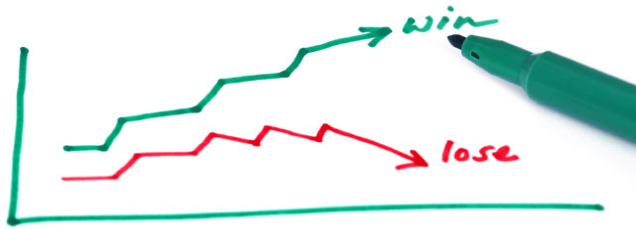
During any major  
strategic planning  
discussions



- Sales RVP team meetings (rotation) (weekly/bi-weekly)
- Enablement webinars
- Sales Advisory Board (moderator)
- New: CI Office Hours



- Product Management team
- Sales regional QBRs
- Sales leadership
- Executive briefing



## Why Win/Loss Improvement?

1. A validated pain point
2. An initiative that has a high priority
3. Measurable

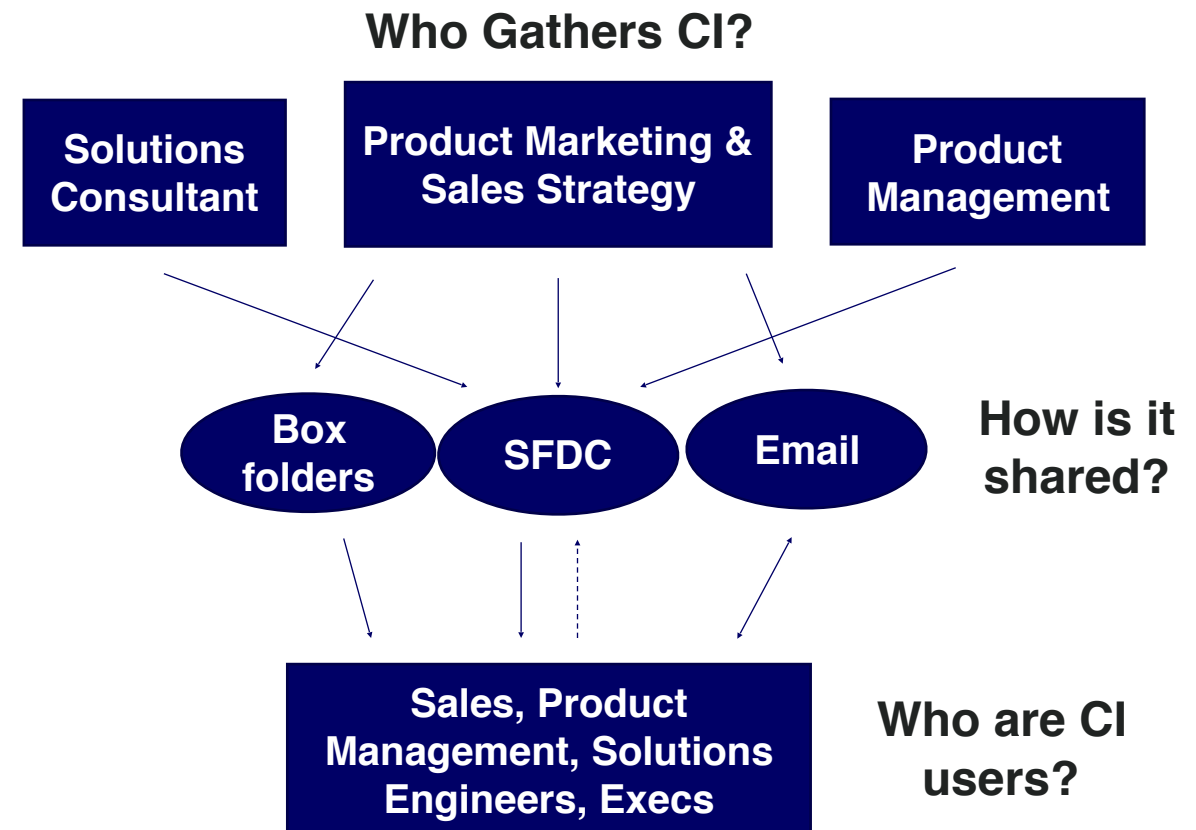


## Steps to Success

1. Identify required win/loss data fields in CRM
2. Win/Loss 2.0: revamping of SFDC fields and education around best practices
3. Develop cadence for reviews by 3<sup>rd</sup> party providers

*CI had many origination points and generally flowed in one direction*

- Gathered by several BUs
- Stored in numerous places
- Distributed to multiple audiences without customization
- CI documents not updated regularly and lost reliability as a result
- No way to capture CI from the field
- Lack of mobile functionality



- Establish legal/ethical parameters
- Not “No”, but “Not now” or “Stay tuned”
- Tie expectations to budget





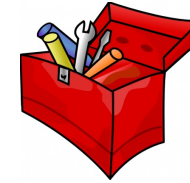
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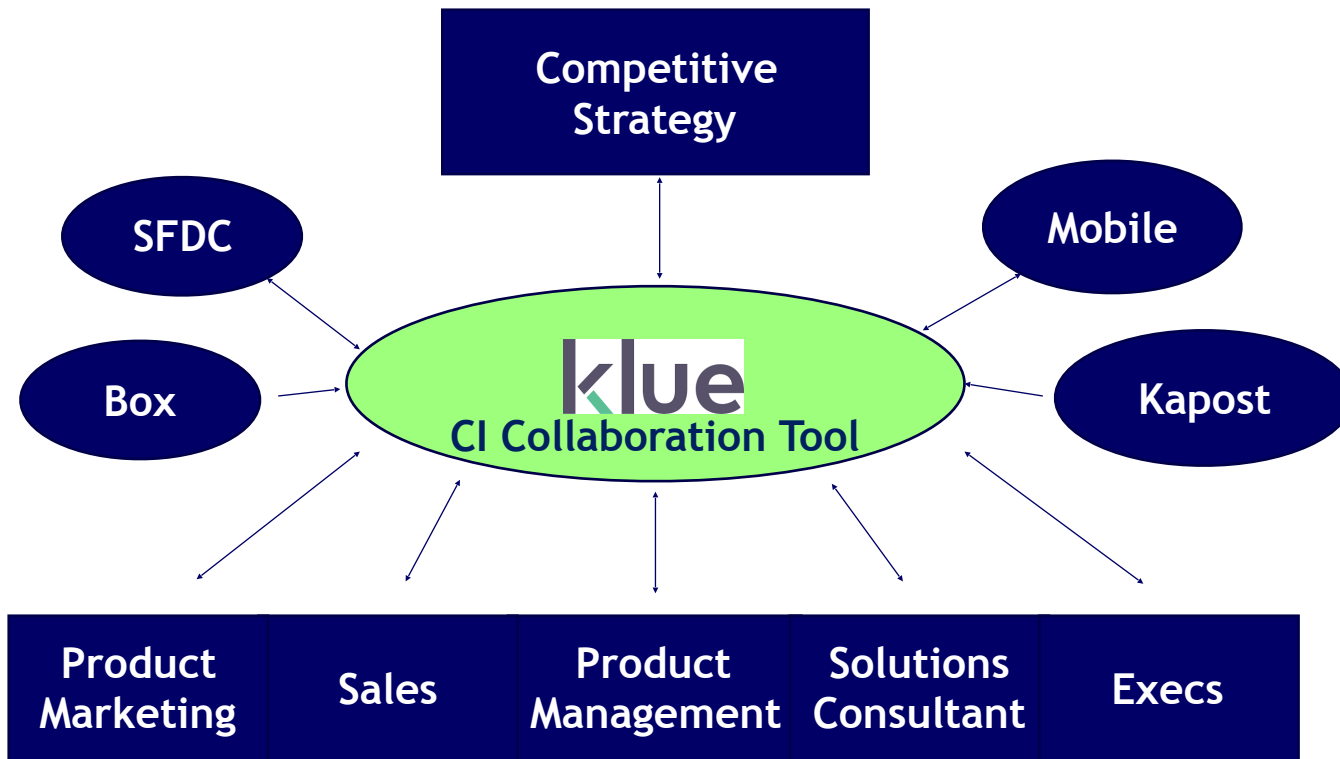
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klue

Scenario  
Planning

Tradeshow  
Monitoring





- All CI-related material is accessible in one place
- Data monitoring
  - Competitor activity
  - Industry information
  - Technology trends
  - Website updates
- Customizable battlecards + integration into SFDC
- Newsletter generation
- Win/Loss data from SFDC for each competitor
- Mobile accessibility
- Sales can push CI into platform
- True collaborative tool



## Sales Engagement

- Actively participated in Sales Boot Camp
- Attended EMEA QBRs
- Chatter engagement



## Create Budget

- Conferences
- Tradeshow coverage
- CI collaboration tool
- Win/loss analysis
- Scenario planning
- Special projects



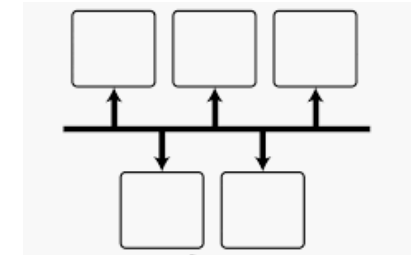
## Brand CI Internally

- Create CS logo
- Test logos with sales
- Develop CS templates



## Finalize solutions provider(s)

- Collaborative CI tool
- Other projects



## Build Timeline

- Prioritize
- Develop cadence
- Budget-dependent

## Considerations

- Prioritize
- Cost vs. ROI



## Nice to Have

- Conferences
- Tradeshow coverage
- Subscriptions, memberships
- Scenario planning



Win/Loss  
2.0/2.5







**Poll #3: What are your take-aways from today's webinar?**



**SERVICEMAX**

# Q & A

## Tracy Berry

[tracy.berry@servicemax.com](mailto:tracy.berry@servicemax.com)

+1.925.989.9242 m (U.S.)

+33.06.33.97.33.34 m (France)



@tberryfine



[www.linkedin.com/in/tberryfine](http://www.linkedin.com/in/tberryfine)



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