



AI BUSINESS TOOLKIT / MODULE 08

# COMPETITOR ANALYSIS TEMPLATE

SEE THE MARKET CLEARLY.  
COMPARE WITH EVIDENCE.  
DECIDE WITH CONFIDENCE.

- 20-PAGE COMPETITOR INTELLIGENCE SYSTEM
- PRODUCT, PRICING, SEO + MESSAGE FRAMEWORKS
- WORKED SAAS EXAMPLE + WEIGHTED SCORECARD
- AI PROMPTS, QA RULES + 30-DAY ACTION PLAN

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# Contents

A complete system: from a precise market question to a decision you can test.

- |    |                                                                                                       |       |
|----|-------------------------------------------------------------------------------------------------------|-------|
| 01 | <b>System + research brief</b><br>Define the decision, customer, category and evidence standard.      | 03-04 |
| 02 | <b>Competitor discovery + dossier</b><br>Find direct, indirect, substitute and emerging competitors.  | 05-06 |
| 03 | <b>Product + pricing intelligence</b><br>Compare capabilities, value metrics, packaging and friction. | 07-08 |
| 04 | <b>Positioning + conversion</b><br>Decode promises, proof, UX, objections and calls to action.        | 09-10 |
| 05 | <b>SEO + channel visibility</b><br>Map topics, gaps, search intent and share of voice.                | 11-12 |
| 06 | <b>Voice of customer + SWOT/TOWS</b><br>Turn reviews into priorities and strategic moves.             | 13-14 |
| 07 | <b>Scorecard + synthesis</b><br>Weight what matters and translate evidence into decisions.            | 15-16 |
| 08 | <b>AI workflow + 30-day plan</b><br>Accelerate responsibly and move from research to execution.       | 17-18 |
| 09 | <b>One-page analysis canvas</b><br>Reuse the full method for the next market or launch.               | 19    |

## WHAT "PREMIUM" MEANS HERE

Every framework includes an explanation, a completed example and a decision rule. Use the blank fields only after you understand the example; the document is designed to teach the method, not merely collect notes.

# The competitor intelligence system

Competitor analysis is useful only when it changes a real decision.

**1**

## DECISION

Choose one decision before research.

**3-5**

## COMPETITORS

Enough variety without noise.

**5+**

## EVIDENCE TYPES

Pages, reviews, demos, ads, SEO.

**30**

## DAYS

Test the strongest implication.

### 01 FRAME

Define customer, category, geography and decision.

### 02 COLLECT

Capture dated facts, quotes and screenshots.

### 03 COMPARE

Use identical criteria and weighted priorities.

### 04 DECIDE

Choose one gap, risk and next experiment.

## WHAT COMPETITOR ANALYSIS IS

A structured comparison of how alternatives solve the same customer job. It explains the trade-offs customers already see and the expectations your market has created.

- Descriptive: What does each competitor offer, promise and charge?
- Diagnostic: Why do customers choose, reject or replace it?
- Strategic: Where can you be more relevant, credible or distinctive?

## WHAT IT IS NOT

It is not a feature-copying exercise, a one-time screenshot or a ranking built from personal taste.

- Do not call an assumption a fact.
- Do not compare mismatched customer segments without noting the difference.
- Do not chase every competitor move. Protect your own strategy.
- Do not collect evidence without assigning an owner and action.

## QUICK-START OUTPUT

By the end, you should be able to say: "For [customer], the market over-serves [need] but under-serves [need]. Competitor A wins through [advantage]; Competitor B is vulnerable on [gap]. We will test [specific action] because [evidence]."

# Write a research brief that prevents wasted work

A narrow question produces evidence you can act on; a broad question produces a pile of tabs.

## 1. DECISION TO SUPPORT

Weak: "Understand competitors."

Strong: "Decide whether a simple client portal can win independent consultants in the US at \$15-\$30/month."

- Owner: product founder
- Deadline: 10 days
- Decision: positioning + MVP scope

## 2. MARKET BOUNDARIES

Customer: independent consultants with 3-15 active clients.

Job: share progress, files and next steps.

Category: client portal / lightweight project workspace.

Geography: English-speaking markets.

Price range: \$0-\$50/month.

## 3. EVIDENCE HIERARCHY

- Tier A: current pricing, product docs, demos, terms.
- Tier B: verified reviews, customer interviews, forum threads.
- Tier C: articles and social claims that need confirmation.
- Add URL, access date and screenshot for claims likely to change.

## 4. REQUIRED OUTPUTS

- Competitor landscape and 3-5 priority profiles.
- Feature, pricing, positioning and channel comparison.
- Customer pain clusters and evidence register.
- Weighted scorecard, risk list and 30-day action plan.

| BRIEF FIELD    | YOUR ANSWER | QUALITY CHECK                 |
|----------------|-------------|-------------------------------|
| Decision       | _____       | Can it change within 30 days? |
| Customer       | _____       | Specific job + situation?     |
| Category       | _____       | Includes substitutes?         |
| Success signal | _____       | Observable and measurable?    |

## STOP CONDITION

End research when new sources repeat known patterns and the remaining uncertainty would not change the decision.

# Map the real competitive landscape

Your strongest competitor may be a spreadsheet, an agency, or the habit of doing nothing.

| TYPE         | CUSTOMER VIEW                              | EXAMPLE: CLIENT PORTAL                  | HOW TO FIND IT                               |
|--------------|--------------------------------------------|-----------------------------------------|----------------------------------------------|
| Direct       | Same job, same audience, similar delivery. | A portal built for consultants.         | Search category + audience; review sites.    |
| Indirect     | Same job, different product category.      | Project-management or CRM tool.         | Search the job, not the category.            |
| Substitute   | Manual or service-based workaround.        | Email, Drive folders, spreadsheets.     | Interview customers; inspect workflows.      |
| Emerging     | New model that may reset expectations.     | AI-generated client updates.            | Product launches, communities, funding news. |
| Aspirational | Experience benchmark outside the niche.    | Premium banking-style client dashboard. | Ask: "Whose UX do customers praise?"         |

## DISCOVERY SEARCH KIT

- "best [category] for [audience]"
- "[competitor] alternatives" and "[competitor] vs"
- "how do you [job] without [category]"
- Reddit/forum questions containing "recommend," "switch," "hate," or "too expensive."
- Review-site category leaders, new entrants and products with fast review growth.

## SHORTLIST RULE

Start wide, then retain only competitors that help answer the brief.

- 2 direct competitors with meaningful market proof.
- 1 indirect tool customers already use.
- 1 substitute or "do nothing" workflow.
- 1 emerging or aspirational benchmark.
- Exclude brands with a completely different buyer, budget or use case.

## WORKED LANDSCAPE EXAMPLE

Decision: launch a lightweight client portal for consultants. Direct: Copilot and SuiteDash. Indirect: Notion client portals. Substitute: shared Google Drive + email. Emerging: AI meeting assistants that automatically create client summaries. Why it matters: the substitute sets the price anchor at nearly zero, while premium portals set expectations for branding, payments and security.



# Build a competitor dossier, not a scrapbook

Capture facts in a repeatable structure so another person can verify your conclusions.

| FIELD        | COMPLETED EXAMPLE — “PORTALPRO”                             | WHY IT MATTERS                                   |
|--------------|-------------------------------------------------------------|--------------------------------------------------|
| Audience     | Small agencies and consultants managing recurring clients.  | Defines whether comparison is fair.              |
| Core promise | “Run your entire client business from one branded portal.”  | Reveals desired outcome + category frame.        |
| Offer        | Portal, messaging, forms, invoices, files, automation.      | Shows breadth and bundle strategy.               |
| Pricing      | \$39 / \$79 / \$149 monthly; annual discount; no free plan. | Signals buyer maturity and expansion path.       |
| Proof        | 2,000+ teams; testimonials highlight consolidation.         | Shows the claims customers are asked to believe. |
| Friction     | Long setup; feature density; migration required.            | Possible opening for simplicity.                 |
| Recent move  | Added AI summary and white-label mobile app.                | Indicates strategic direction.                   |

### EVIDENCE REGISTER

- Claim: “No free plan.”
- Source: /pricing page, accessed 16 Aug 2026.
- Evidence: screenshot + plan table.
- Confidence: high.
- Change risk: high — pricing can change.
- Implication: a free preview may reduce trial friction.

### VERIFICATION RULES

- Use first-party sources for features and prices.
- Use customer sources for experience and objections.
- Label inferred strategy as an inference.
- Record dates and market/currency.
- Recheck decisive claims before publishing.
- Never invent review quotes or customer numbers.

### DOSSIER TEMPLATE

Brand / URL: \_\_\_\_\_ Access date: \_\_\_\_\_  
Audience + job: \_\_\_\_\_  
Promise + proof: \_\_\_\_\_  
Offer + pricing: \_\_\_\_\_  
Friction + strategic implication: \_\_\_\_\_



# Compare outcomes before features

Customers buy progress. Features matter only when they reduce time, risk, effort or uncertainty.

| CUSTOMER OUTCOME      | YOUR OFFER              | PORTALPRO                 | NOTION TEMPLATE       | IMPORTANCE |
|-----------------------|-------------------------|---------------------------|-----------------------|------------|
| Start in one hour     | Guided setup + defaults | Powerful but complex      | Fast if template fits | 5 / 5      |
| Share branded updates | Native client view      | Strong white-label portal | Shareable page        | 5 / 5      |
| Collect approvals     | Comments + approve      | Forms + workflows         | Manual checkbox       | 4 / 5      |
| Invoice clients       | Integration only        | Native billing            | External tool         | 3 / 5      |
| Automate summaries    | AI weekly recap         | AI assistant              | AI blocks             | 4 / 5      |
| Control permissions   | Simple roles            | Granular roles            | Page permissions      | 5 / 5      |

## FEATURE SCORING RULE

Score 1-5 on four dimensions:

- Customer value: how strongly does it solve the job?
- Differentiation: can customers get it everywhere?
- Proof: is the experience visible and credible?
- Cost: build, support and complexity burden.
- Priority = value × importance – cost.

## WORKED PRODUCT DECISION

Observation: PortalPro wins breadth; Notion wins flexibility; both require configuration.

Opportunity: win a narrow audience with opinionated defaults, not a longer feature list.

Decision: prioritize a 10-minute client update workflow, permission-safe sharing and reusable consultant templates.

## RED FLAG: CHECKBOX PARITY

Copying every competitor feature creates the same complexity customers complain about. Mark each feature as essential, differentiating, expected later, or deliberately excluded. “Deliberately excluded” is a strategic choice when it protects the experience.

# Decode pricing, packaging and the value metric

The visible price is only one part of the commercial model customers experience.

| MODEL           | ENTRY     | VALUE METRIC    | EXPANSION          | FRICTION / SIGNAL                      |
|-----------------|-----------|-----------------|--------------------|----------------------------------------|
| Your offer      | \$19/mo   | Active clients  | \$39 at 15 clients | Simple; aligns with consultant growth. |
| PortalPro       | \$39/mo   | Features / tier | \$79 + \$149 tiers | Broad bundle; harder plan choice.      |
| TeamBoard       | \$10/user | Seats           | More team members  | Cheap entry; expensive as team grows.  |
| Notion template | \$49 once | One-time asset  | Services / updates | Low commitment; manual maintenance.    |
| Drive + email   | \$0-\$12  | Storage / habit | More storage       | Near-zero anchor; high workflow cost.  |

## PRICING TEARDOWN CHECKLIST

- Monthly vs annual savings and default billing view.
- Free plan, trial, card requirement and refund policy.
- Usage limits: clients, seats, storage, automation.
- High-value features held behind higher tiers.
- Onboarding, migration and support included or sold.
- Overage rules and price increase history.
- Currency, VAT and local purchasing friction.

## WORKED PRICE INSIGHT

Finding: consultants dislike seat pricing because clients occasionally need access.

Hypothesis: price by active client workspace, include unlimited client viewers and keep the team-seat limit generous.

Test: present \$19 for 5 active clients and \$39 for 15; measure pricing-page clicks, trial starts and “too expensive” objections.

## COMMERCIAL IMPLICATION FORMULA

Perceived value = desired outcome + confidence + speed – money – effort – risk.

A higher price can convert better when packaging makes the outcome obvious, removes a painful limit and adds proof. Never infer willingness to pay from competitor prices alone; test it with real buyers.

# Reverse-engineer positioning and message architecture

Look beyond slogans: identify the audience, enemy, promise, mechanism and proof.

| LAYER     | PORTALPRO                            | TEAMBOARD                         | OPENING FOR YOUR OFFER               |
|-----------|--------------------------------------|-----------------------------------|--------------------------------------|
| Audience  | Agencies + established service firms | Cross-functional teams            | Independent consultants              |
| Problem   | Too many disconnected business tools | Work scattered across teams       | Clients lack a simple progress view  |
| Promise   | Run the whole client business        | Coordinate work in one place      | Send a polished update in 10 minutes |
| Mechanism | All-in-one white-label suite         | Boards, views and integrations    | Opinionated client-update workflow   |
| Proof     | Customer count + broad testimonials  | Famous brands + integrations      | Niche use cases + before/after time  |
| Risk      | Feels complex and expensive          | Feels internal, not client-facing | Must build trust as a new brand      |

## MESSAGE EXTRACTION QUESTIONS

- Who is explicitly named — and who is excluded?
- What painful alternative is positioned as the enemy?
- Is the promise functional, emotional or financial?
- What mechanism makes the promise believable?
- What proof appears before the first call to action?
- Which objections are answered — and which are ignored?

## POSITIONING STATEMENT

For independent consultants who need clients to see progress without extra meetings, ClearClient is the lightweight client-update workspace that creates a polished weekly update in ten minutes. Unlike complex all-in-one portals, it starts with a proven consultant workflow and requires no system rebuild.

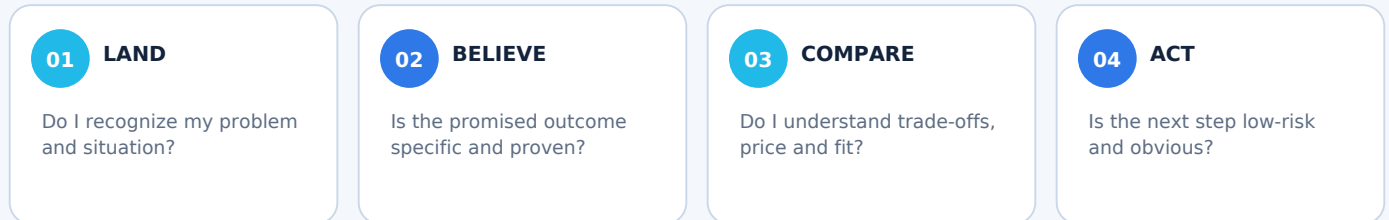
## MESSAGE TEST

Show three headline options to five people who match the segment. After five seconds, ask: Who is this for? What does it help you do? Why is it different? A clever headline that fails this recall test is weaker than a plain, specific promise.



# Audit the website journey and buying friction

Treat the site as a sequence of questions a cautious buyer needs answered.



| TOUCHPOINT | WHAT TO CAPTURE                      | PORTALPRO EXAMPLE                 | YOUR OPPORTUNITY                     |
|------------|--------------------------------------|-----------------------------------|--------------------------------------|
| Hero       | Audience, promise, CTA, proof        | "Run your client business" + demo | Name consultants + 10-minute outcome |
| Product    | Workflow order, screenshots, depth   | Feature-category navigation       | Show one end-to-end weekly update    |
| Pricing    | Plan logic, limits, reassurance      | Three complex bundles             | Two plans + client-based limits      |
| Proof      | Logos, metrics, stories, specificity | Many broad testimonials           | Detailed niche before/after case     |
| Objections | FAQ, security, migration, support    | Comprehensive but buried          | Place top objections near CTA        |
| CTA        | Commitment, wording, next screen     | Book demo / start trial           | Preview sample portal, then trial    |

## FRICTION INVENTORY

- Unclear first step or competing calls to action.
- Generic screenshots that hide the actual workflow.
- Price shown before the buyer understands value.
- Signup requests information not needed yet.
- Security, export or cancellation concerns unanswered.

## WORKED CONVERSION TEST

Hypothesis: consultants need to see the client experience before starting a trial.

Change: replace "Start free" with "View a sample client update," then offer signup inside the preview.

Measure: preview opens, signup rate and completion of first shared update.

# Build an SEO and content gap map

Search visibility reveals which problems competitors educate, compare and convert.

| QUERY / INTENT                                | CURRENT SERP PATTERN        | COMPETITOR ASSET            | BETTER ASSET TO BUILD                         |
|-----------------------------------------------|-----------------------------|-----------------------------|-----------------------------------------------|
| client portal for consultants — commercial    | Listicles + product pages   | Generic “best portals” page | Audience-specific comparison with criteria    |
| client update template — practical            | Docs, Canva, blog templates | Static status template      | Template + completed example + portal preview |
| Notion client portal — solution-aware         | Templates + tutorials       | Setup guide                 | Honest Notion vs dedicated portal guide       |
| how to reduce client meetings — problem-aware | Advice articles             | Broad productivity post     | Workflow with scripts, metrics and calculator |
| client portal pricing — purchase              | Vendor pages                | Plan tables                 | Cost model by client count + alternatives     |

## CONTENT QUALITY SCORE — 25 POINTS

- Intent match (1-5): does the format answer the search?
- Specificity (1-5): audience, context, examples and constraints.
- Evidence (1-5): sources, screenshots, data or lived examples.
- Usefulness (1-5): template, checklist, calculator or next step.
- Distinctiveness (1-5): original angle competitors cannot copy easily.
- Publish at 20+; improve or combine below 16.

## WORKED CONTENT DECISION

Weak idea: “What is competitor analysis?” — high competition, low differentiation.

Strong idea: “Competitor analysis template for solo consultants launching a client portal” — narrower intent, natural product connection and examples.

Asset stack: SEO article → PDF workbook → sample portal → email sequence. One research effort creates multiple useful formats.

## KEYWORD-GAP RULE

Do not select a keyword only because it has volume. Prioritize the intersection of customer relevance, attainable competition, business fit and an asset you can make genuinely better. Verify with Search Console, keyword tools and a manual review of the current results.

# Compare channels, offers and share of voice

A competitor's channel mix shows where demand is created, captured and converted.

| CHANNEL              | PORTALPRO                         | TEAMBOARD                       | YOUR TEST                                | PRIMARY METRIC             |
|----------------------|-----------------------------------|---------------------------------|------------------------------------------|----------------------------|
| Organic search       | Broad category + comparison pages | High-volume productivity topics | Consultant workflow clusters             | Qualified organic sessions |
| Reddit / communities | Occasional brand mentions         | Strong user discussions         | Answer questions; disclose affiliation   | Referral visits + saves    |
| YouTube              | Product demos and webinars        | Creator tutorials               | 5-minute before/after workflow           | Watch time + trial assists |
| Email                | Demo follow-up + product news     | Template nurture                | Template → 5-email implementation series | Activation rate            |
| Partners             | Agency consultants                | App integrations                | Consultant coaches + associations        | Partner-sourced trials     |
| Paid search          | Category + branded terms          | High-intent work terms          | Retarget content visitors only           | CAC / activated trial      |

## SHARE-OF-VOICE SAMPLE

Estimate presence across a fixed sample: 20 search results, 30 relevant community threads, 20 YouTube results and 10 newsletters. Count meaningful mentions, not raw posts.



## CHANNEL SELECTION RULE

- Choose one demand-capture channel: people already seeking a solution.
- Choose one demand-creation channel: people discussing the problem.
- Match content format to the platform; do not paste identical promotion everywhere.
- Track assisted conversions, not only last-click sessions.
- Respect community self-promotion and affiliate rules.

## WORKED CHANNEL PRIORITY

Decision: invest first in SEO templates and practical community participation. Why: competitors prove search demand, while consultant communities repeatedly discuss client-update fatigue. Post useful answers without a link; add the resource only where rules allow and the link completes the answer.

# Turn reviews into a voice-of-customer map

The most valuable review insight is not sentiment; it is the job, expectation and trade-off behind the words.

| RAW CUSTOMER LANGUAGE                                             | CLUSTER          | INTERPRETATION                                     | ACTION                                                |
|-------------------------------------------------------------------|------------------|----------------------------------------------------|-------------------------------------------------------|
| "I spent days configuring it before a client could see anything." | Setup friction   | Time-to-value is part of the product.              | Promise and prove first value in 10 minutes.          |
| "Clients never log in, so I send an email anyway."                | Adoption         | Client behavior matters more than feature breadth. | Email-first updates with optional portal depth.       |
| "I pay for seats that clients use once a month."                  | Pricing fairness | Seat metric conflicts with occasional viewers.     | Unlimited client viewers; price by active workspaces. |
| "The portal looks professional, but reporting is rigid."          | Control          | Users want polish without losing flexibility.      | Custom sections with strong defaults.                 |
| "I replaced three tools, but onboarding was painful."             | Bundle trade-off | Consolidation value can justify setup cost.        | Offer migration help only in higher tier.             |

## REVIEW CODING METHOD

- Context: who is speaking and what are they doing?
- Trigger: what caused adoption, rejection or switching?
- Outcome: what improved or failed?
- Emotion: anxious, proud, relieved, frustrated?
- Frequency: one anecdote or repeating pattern?
- Commercial impact: activation, retention, expansion or trust?

## EVIDENCE DISCIPLINE

- Keep the original quote and source link.
- Do not treat star ratings as diagnosis.
- Compare recent and older reviews after product changes.
- Notice plan, company size and use case.
- Separate product failure from bad-fit customers.
- Validate major patterns in interviews or support data.

## PRIORITY FORMULA

Opportunity priority = frequency × severity × strategic fit × confidence.

Example: setup friction scores high on frequency (5), severity (4), fit (5) and confidence (4) = 400. Native invoicing scores  $2 \times 2 \times 2 \times 3 = 24$ . Solve setup first even if invoicing appears on more feature checklists.

# Move from SWOT observations to TOWS actions

A SWOT becomes strategic only when strengths and weaknesses are connected to external opportunities and threats.

| INTERNAL / EXTERNAL                             | OPPORTUNITY: CONSULTANTS WANT SIMPLICITY                                                                           | THREAT: LARGE TOOLS ADD SIMPLE MODES                                                                      |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Strength: opinionated workflow + niche language | SO move: launch consultant-specific templates and a 10-minute demo that large generic tools cannot match credibly. | ST move: deepen workflow knowledge, community trust and migration speed rather than feature breadth.      |
| Weakness: new brand + limited integrations      | WO move: partner with consultant coaches and integrate only calendar, Drive and payments first.                    | WT move: avoid enterprise claims; publish security, export and roadmap transparency to reduce trust risk. |

## FOCUSED SWOT — WORKED EXAMPLE

- Strengths: fast setup; niche consultant workflow; client-first experience.
- Weaknesses: small integration set; low awareness; limited proof.
- Opportunities: demand for fewer meetings; template search; AI summaries.
- Threats: bundling by established tools; zero-price substitutes; security concerns.
- Strategic tension: add enough depth to retain customers without losing the simplicity that creates differentiation.

## ACTION-WRITING STANDARD

Every TOWS action should contain five parts:

- Because: evidence or strategic condition.
- We will: specific move and target audience.
- By: owner, asset or product change.
- Within: deadline.
- Measured by: observable success signal.
- Example: “Because setup complaints repeat, Product will prototype guided defaults by 30 Sep, measured by first-share time below 10 minutes.”

## YOUR STRATEGIC SENTENCE

Because \_\_\_\_\_, we will \_\_\_\_\_ for  
\_\_\_\_\_ by \_\_\_\_\_, measured by \_\_\_\_\_.

# Use a weighted scorecard without fooling yourself

Weights reflect customer priorities; scores reflect evidence. Keep those two judgments separate.

| CRITERION                   | WEIGHT | YOUR OFFER | PORTALPRO | NOTION | EVIDENCE NOTE                 |
|-----------------------------|--------|------------|-----------|--------|-------------------------------|
| Time to first client update | 20%    | 5          | 2         | 3      | Observed setup + demo         |
| Client adoption ease        | 18%    | 5          | 4         | 3      | Email-first access vs login   |
| Branding / professionalism  | 15%    | 4          | 5         | 3      | Visual and white-label review |
| Workflow flexibility        | 12%    | 3          | 5         | 5      | Product documentation         |
| Pricing fairness            | 12%    | 5          | 3         | 4      | Client metric vs tiers        |
| Integrations                | 10%    | 2          | 5         | 4      | Verified integration lists    |
| Trust / proof               | 8%     | 2          | 5         | 5      | Customers, reviews, longevity |
| AI summary quality          | 5%     | 4          | 4         | 3      | Same test transcript          |
| WEIGHTED TOTAL              | 100%   | 4.10       | 3.72      | 3.66   | Score × weight, then sum      |

## FORMULA + SENSITIVITY TEST

Weighted total =  $\Sigma(\text{score} \times \text{weight})$ .

Then change the top two weights by  $\pm 5$  points. If the winner changes easily, the decision is sensitive and requires better customer evidence. If the result remains stable, the strategic implication is more robust.

## INTERPRETATION

Your offer leads the target niche because speed and client adoption carry 38% of the weight. PortalPro still leads proof, flexibility and integrations.

Decision: preserve the speed advantage; borrow trust practices, not product complexity. Build a security page, three detailed case studies and the top three integrations.

## BIAS CONTROLS

- Define scoring anchors before rating: 1 = materially poor; 3 = acceptable; 5 = category-leading evidence.
- Have a second person score independently; discuss differences larger than one point.
- Use “unknown” instead of guessing. Unknowns become research tasks.
- Do not choose weights that make your product win. Derive them from customer evidence.

# Convert evidence into strategic decisions

A strong synthesis states the implication, trade-off, action and proof needed next.

| EVIDENCE PATTERN                                   | IMPLICATION                                     | DECISION                                            | NEXT PROOF                               |
|----------------------------------------------------|-------------------------------------------------|-----------------------------------------------------|------------------------------------------|
| Setup complaints repeat across direct tools.       | Speed can be a meaningful wedge.                | Design around first shared update, not admin setup. | Usability test: median under 10 minutes. |
| Clients resist extra logins.                       | Portal adoption depends on communication habit. | Email summary first; portal depth second.           | Measure client open and return rates.    |
| Seat pricing feels unfair for occasional viewers.  | Value metric can differentiate.                 | Unlimited client viewers; price active workspaces.  | Pricing interviews + landing-page test.  |
| Competitors win trust through breadth and history. | A narrow new brand needs stronger proof.        | Publish security, export and niche case evidence.   | Objection rate and trial activation.     |
| Template searches show problem-aware demand.       | Content can acquire before product awareness.   | Build consultant update template cluster.           | Ranking, downloads and activated trials. |

## OPPORTUNITY PORTFOLIO

- Now: guided setup, sample client update, pricing clarity.
- Next: templates, case studies, core integrations.
- Later: invoicing, advanced automation, mobile branding.
- Not now: enterprise permissions and broad CRM features.
- Capacity rule: one product, one message and one acquisition experiment per cycle.

## ETHICAL “COPY / AVOID / CREATE”

- Copy the principle: reduce risk with visible proof.
- Avoid the weakness: do not hide critical limits.
- Create the distinction: a workflow and voice owned by your niche.
- Never copy protected text, visuals, code, trademarks or confidential information.
- Compete on better understanding and execution.

## EXECUTIVE SYNTHESIS — WORKED ANSWER

Market truth: established portals sell breadth, but consultants repeatedly struggle with setup and client adoption. Strategic choice: own the fastest credible client-update workflow. Trade-off: intentionally delay advanced back-office features. 30-day proof: five consultants create and share a branded update in under ten minutes; at least 60% of invited clients open it.

# Use AI for speed — keep humans responsible for truth

AI can structure, compare and challenge verified evidence; it must not become the source of competitor facts.

## MASTER ANALYSIS PROMPT

Role: Act as a senior competitive-intelligence analyst.

Decision: [paste the decision and market boundary].

Evidence: Use only the dated evidence register below. Never invent prices, features, customer quotes or market share. Mark facts, interpretations and unknowns separately.

Output: (1) comparison by customer outcome, (2) repeated customer pain clusters, (3) weighted-scorecard suggestions with rationale, (4) three strategic opportunities, (5) risks and evidence gaps, (6) one 30-day test per opportunity.

## PROMPT 2 — CHALLENGE THE CONCLUSION

“Act as a skeptical reviewer. Identify where the conclusion overreaches the evidence, where comparisons are unfair, which alternative explanations fit the facts, and what new evidence would most likely reverse the recommendation. Return a red-team table: claim / weakness / missing proof / safer wording.”

## PROMPT 3 — SYNTHESIZE REVIEWS

“Code the supplied review excerpts by context, trigger, job, pain, desired outcome, emotion and commercial impact. Keep every insight linked to its source ID. Report frequency counts, contradictions and segment differences. Do not rewrite excerpts as quotes.”

| QA CHECK            | PASS CONDITION                             | IF IT FAILS                  |
|---------------------|--------------------------------------------|------------------------------|
| Source fidelity     | Every factual claim links to evidence ID.  | Remove claim or research it. |
| Freshness           | Time-sensitive data has date + market.     | Recheck first-party page.    |
| Comparison fairness | Same segment, task and scoring anchor.     | Split or qualify comparison. |
| Uncertainty         | Unknowns and inferences are labeled.       | Downgrade confidence.        |
| Actionability       | Recommendation has owner, test and metric. | Rewrite as experiment.       |

# Run a 30-day competitor-to-action sprint

Research has a deadline. The final week is for testing, not collecting more tabs.

| WEEK                | OBJECTIVE                       | KEY TASKS                                                                      | DELIVERABLE            | SUCCESS SIGNAL                             |
|---------------------|---------------------------------|--------------------------------------------------------------------------------|------------------------|--------------------------------------------|
| 1 — Frame + collect | Create a reliable market view.  | Brief; 5 competitors; evidence register; 20 reviews; 3 customer conversations. | Landscape + dossiers   | Critical claims sourced; unknowns visible. |
| 2 — Compare         | Explain meaningful trade-offs.  | Product, pricing, message, UX, SEO and channel analysis.                       | Matrices + insight log | Five repeated patterns across sources.     |
| 3 — Decide          | Choose a narrow strategic move. | TOWS; scorecard; sensitivity; executive synthesis; experiment design.          | Decision memo          | Owner accepts trade-off and scope.         |
| 4 — Test            | Collect real response.          | Prototype or landing page; recruit users; measure behavior; document result.   | Experiment report      | Metric, learning and next decision.        |

## DAILY OPERATING RHYTHM

- 15 min: update evidence register and unknowns.
- 30 min: collect one high-quality source, not ten weak ones.
- 20 min: translate evidence into an implication.
- 10 min: note what would change the decision.
- Friday: review with decision owner; close low-value threads.
- Keep screenshots, source dates and versioned conclusions in one research folder.

## EXPERIMENT CARD — EXAMPLE

Hypothesis: a sample client update reduces uncertainty and increases signup.  
Audience: independent consultants with 3-15 clients.  
Change: interactive sample before signup.  
Primary metric: activated trials that share an update.  
Guardrail: support requests per activation.  
Target: +25% activation with no >10% support increase.  
Decision date: day 30.

## WEEKLY DECISION LOG

We believed: \_\_\_\_\_ Evidence changed: \_\_\_\_\_  
Therefore we decided: \_\_\_\_\_  
Owner / date / metric: \_\_\_\_\_

# One-page competitor analysis canvas

Use this page to repeat the method for a new product, launch, market or content asset.

## 1. DECISION + BOUNDARIES

Decision: \_\_\_\_\_  
 Customer + job: \_\_\_\_\_  
 Category / geography / price: \_\_\_\_\_  
 Deadline + owner: \_\_\_\_\_

## 2. COMPETITOR SET

Direct 1 / 2: \_\_\_\_\_  
 Indirect: \_\_\_\_\_  
 Substitute: \_\_\_\_\_  
 Emerging / aspirational: \_\_\_\_\_

## 3. EVIDENCE PATTERNS

Product / UX: \_\_\_\_\_  
 Pricing / packaging: \_\_\_\_\_  
 Positioning / proof: \_\_\_\_\_  
 SEO / channels: \_\_\_\_\_  
 Customer language: \_\_\_\_\_

## 4. STRATEGIC READING

Competitor advantage: \_\_\_\_\_  
 Competitor vulnerability: \_\_\_\_\_  
 Gap we can own: \_\_\_\_\_  
 Threat to monitor: \_\_\_\_\_  
 Key unknown: \_\_\_\_\_

## 5. WEIGHTED DECISION

Top three criteria + weights: 1) \_\_\_\_\_ % 2) \_\_\_\_\_ % 3) \_\_\_\_\_ %  
 Leading option + why: \_\_\_\_\_  
 Sensitivity: Which changed weight or missing fact could reverse the decision?  
 \_\_\_\_\_

## 6. ACTION

Move: \_\_\_\_\_  
 Trade-off / "not now": \_\_\_\_\_  
 Owner + date: \_\_\_\_\_  
 Asset / product change: \_\_\_\_\_

## 7. TEST + MEASURE

Hypothesis: \_\_\_\_\_  
 Audience: \_\_\_\_\_  
 Primary metric: \_\_\_\_\_  
 Target + guardrail: \_\_\_\_\_



MODULE COMPLETE / 20 OF 20

# SEE THE MARKET. CHOOSE YOUR EDGE. MOVE WITH PROOF.

You now have a complete system for framing a decision, mapping competitors, verifying product and pricing claims, decoding positioning, finding search and channel gaps, clustering customer evidence, scoring trade-offs and running a 30-day experiment.



## REUSE THE SYSTEM

- Start every project with a precise decision and market boundary.
- Keep one evidence register with dates, links, screenshots and confidence.
- Compare customer outcomes and trade-offs before counting features.
- Use the weighted scorecard only after customer priorities are clear.
- Run the AI QA checklist before publishing a claim or recommendation.
- End every analysis with one owner, one test, one metric and one decision date.

## Help us create more practical resources

If this competitor intelligence system saved time or improved a decision, consider supporting Digital World Pulse. Every contribution helps fund original guides, examples, design, testing and hosting.

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SEE CLEARLY. COMPARE FAIRLY. DECIDE WITH CONFIDENCE.