SAMPLE DELIVERABLE

COMPETITIVE BRIEF — METHODOLOGY SAMPLE

This is a sanitized template based on real client work, shown here to illustrate how we structure, source, and design competitive intelligence deliverables. Company names, figures, and specifics have been replaced with placeholders.

SUBJECT	CATEGORY	PREPARED FOR	DATE
[Competitor Name]	[Client's Industry]	[Client] Founders	[Date]

● **VERIFIED** confirmed on their site

○ **INFERRED** reasonable read of public signals

■ **UNCONFIRMED** needs direct follow-up

SEC. 01

EXECUTIVE SUMMARY

- **Lead with the structural difference,** not a feature list; the single sentence a founder should remember if they read nothing else. ○ INFERRED
- **Publish pricing exactly as confirmed,** distinguishing list price from any marketing tool's illustrative numbers. ● VERIFIED
- **Flag anchor figures for what they are.** A number pulled from a calculator or comparison widget is a marketing device, not a data point, until tested directly. ○ INFERRED
- **State product maturity by evidence,** not impression; page depth, tier structure, and named capabilities, not a vibe. ○ INFERRED
- **Call out uneven go-to-market investment** across segments; this is usually where the openings are. ○ INFERRED

▲ SEC. 02

COMPANY & PRODUCT SNAPSHOT

[COMPETITOR NAME]

● VERIFIED

One or two sentences on structure, headquarters signal, product tiers, and any adjacent business lines (training, content, hardware); sourced directly from their own site.

[YOUR COMPANY]

● VERIFIED

The same treatment applied to the client; stated plainly, so the comparison that follows starts from two accurate snapshots, not assumptions.

This is where the brief earns trust: two short, factual snapshots before any judgment gets introduced. The structural difference named in the executive summary should be visible here in the raw facts, not asserted.

▲ SEC. 03

PRICING ANALYSIS

Entry Tier ● VERIFIED

Who it's built for and what's included, kept short

$XX
per user / month

Entry Tier (annual)

Same tier, annual billing; note the effective discount if any

$XXX
per user / year

Enterprise Tier ● VERIFIED

What unlocks at this tier, and what that implies about their target account size

Custom
sales-quoted

> **Confirm before citing:** if a number shows up in a calculator, quiz, or comparison widget, test whether it actually moves with your inputs before treating it as real. A static number in an "ROI" tool is a marketing anchor, not a modeled estimate; and that distinction changes how it should be used in a brief.

Read the pricing structure for what it implies about strategy: a cheap, frictionless entry point paired with a quote-only enterprise tier usually signals a self-serve-to-sales-assist funnel, not a flat one-size offer.

▲ SEC. 04

FEATURE & PRODUCT COMPARISON

CAPABILITY	[COMPETITOR]	[YOUR PRODUCT]
Core workflow depth	✓ Confirmed on their site	✓ Confirmed internally
Adjacent capability A	✓ Present, tiered by plan	Not confirmed publicly; verify
Front-office / intake layer	No visible module	✓ Named stage in core product
Back-office / billing layer	Not surfaced	✓ Named stage in core product
Compliance / audit trail	✓ Enterprise tier only	Not confirmed publicly; verify
Adjacent service line	None found	✓ Confirmed offering

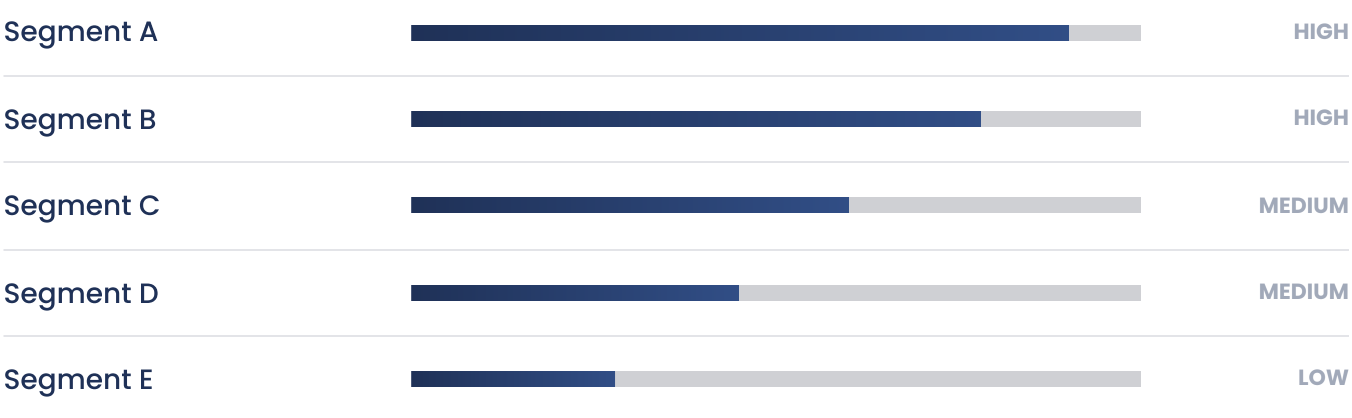
Keep the two columns honest about their sourcing: what's confirmed from public marketing versus what's confirmed internally versus what's genuinely unverified. Blending those into one confident-sounding table is the fastest way to lose a founder's trust in the whole brief.

○ INFERRED

▲ SEC. 05

GO-TO-MARKET & SEGMENT STRENGTH

Relative investment signal per segment, read from page depth, named case-study detail, and specificity of copy; directional, not a measured metric.



The thin segments are usually the more useful finding; they mark where messaging can outflank a competitor's home turf without a head-on fight.

▲ SEC. 06

STRUCTURAL DIFFERENTIATORS

WHERE THE CLIENT HAS A STRUCTURAL EDGE

- **Name the asset a competitor can't replicate quickly**; an operating credential, a service line, a relationship, not just a feature that could be copied.
- **Name the workflow gap** if the client's product spans a broader part of the business than the competitor's does.
- **Name the packaging advantage** if the client can offer as one relationship what the competitor can only offer piecemeal.

WHERE THE COMPETITOR HAS A STRUCTURAL EDGE

- **Say it plainly.** A brief that only flatters the client isn't useful; name real category maturity, funding, or distribution advantages the competitor holds.
- **Note funnel or friction differences**; self-serve versus sales-assist, free trial versus demo-gated.

- **Note content or channel investment** that signals where their inbound demand is coming from.

SEC. 07

GAPS & OPEN QUESTIONS

OPEN	Customer count, named logos, and third-party reviews; needed to size real footprint against marketing claims.
OPEN	Team size and funding status, where findable; affects how aggressively a competitor can invest going forward.
RESOLVED	Example of a closed loop: a claimed figure was tested directly, confirmed static, and reclassified from Inferred to Verified in Sec. 03; this is the living-document mechanic in action.
OPEN	A hands-on trial of the competitor's product to verify the feature comparison table directly, rather than from marketing copy alone.

SEC. 08

RECOMMENDED POSITIONING ANGLES

ANGLE 01

LEAD WITH THE HARDEST-TO-COPY ASSET

Whatever the client has that a competitor structurally cannot replicate quickly belongs at the top of the narrative, not buried in a feature table.

ANGLE 02

REFRAME THE CATEGORY, NOT JUST THE PRODUCT

If the client's offering spans more of the customer's problem than the competitor's does, name that scope difference explicitly.

ANGLE 03

GO WHERE THEIR MARKETING IS THIN

Under-invested segments are lower-resistance ground to contest first, before a head-on fight in their strongest territory.

ANGLE 04

CHOOSE A PRICING POSTURE ON PURPOSE

Match the competitor's friction-reducing motion, or lean the opposite direction to reinforce a premium story; either is defensible, but it should be a decision, not a default.

Sources — client competitor's pricing, solutions, and homepage; public app store listings; client's own site.
Compiled [Date] · Living document; update fields as new signals come in rather than on a fixed schedule.

This sample shows our approach to competitive intelligence: every claim sourced and confidence-tagged, findings organized for a founder's decision-making rather than for completeness, and formatting built to be read, not skimmed past. **Get in touch** to talk about a brief like this for your team.