



# COMPETITIVE SALES BATTLECARDS 101

**A Step-By-Step Guide to Building  
Competitive Sales Battlecards**

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How to Spot a  
Competitor Battlecard

# THE IMPORTANCE OF BUILDING BETTER BATTLECARDS

If you Google, “competitive battlecard templates,” you will find good-looking Word Docs, PDFs, and PowerPoint presentations. These docs have nicely formatted little boxes with pre-set headings just begging to be filled out. Do you know what this does?

It encourages you to fill space.

Competitive sales battlecards should not be “filled up”; they should contain the absolute minimum amount of content needed to enable your sales team to convert a prospect into a client. Period.

To provide an alternative to these over-formatted competitive sales battlecard templates, we put together ***Competitive Battlecards 101*** – a guide to change how you think about battlecards.

Rather than providing a generic reusable sales battlecard template, we want to instead give you the tools to make your own arsenal of short, snappy battlecards that will help your sales reps to impact your bottom-line.

Break away from cookie-cutter battlecards, and learn how to build battlecards your salespeople will love. And, actually use.

# APPROACH TO MARKET BATTLECARD TEMPLATE

**COMPETITIVE BATTLECARD #1:**  
Approach to Market Template

KLUE BATTLECARDS — 4/5

EDIT OVERVIEW — REVIEWED: 4 MONTHS AGO BY @NICKB

**Approach to Market** [VIEW IN PROFILE](#)

Their key clients (link to evidence w/names, 200+ enterprise customers including 80 of F100)

**Verticals served:**

- List verticals

**Departments served:**

- List departments

**Channel partners:**

- List partners (Identify - resellers, third party providers.

Tip: Take note of what features are provided by third party providers. This may contribute to a weakness that can help turn a deal.

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# APPROACH TO MARKET

## Competitive Sales Battlecard Template #1

The **Approach to Market** card explores your competitors' go-to-market strategy. It looks at the verticals and departments they serve, and how they sell.

If you can understand how the sales reps you face-off against are selling, you'll make better decisions about your own sales strategy.

For example, if one of their strategies is to constantly cut prices, that might affect who you target and how you price competitively.

Another example concerns a competitor's marketing approach – say they tend to push proof of concepts.

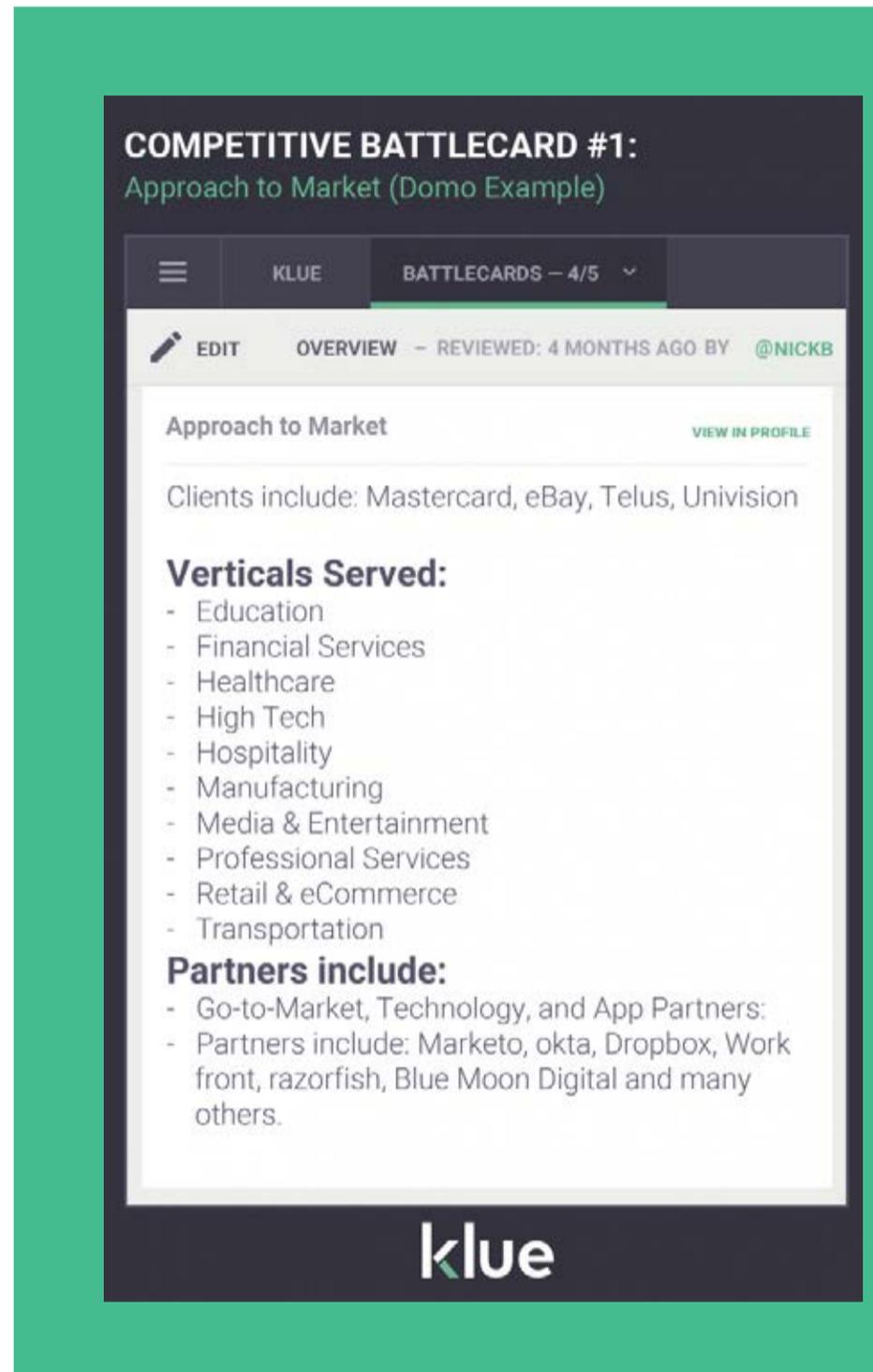
If you are aware that your prospect will likely be given a proof of concept during the sales cycle, you'll know that proving ROI could be key to closing the deal against that competitor.

This card doesn't need to include all aspects of your competitor's go-to-market strategy. Certain topics – such as product positioning – might be worthy of its own card (don't worry, we'll cover this later in the ebook).

Keep it succinct to give your sales reps a quick understanding of how this competitor approaches customers and who they target.

### Why should you use this sales battlecard?

Knowing what to expect from your competitors can help you make better decisions for who to approach, how to approach them, and ways to effectively compete against them in the sales cycle.



### How do you build this sales battlecard

This card should contain details on general approach to market, key clients, verticals served, departments served and channel partners.

# APPROACH TO MARKET

Continued

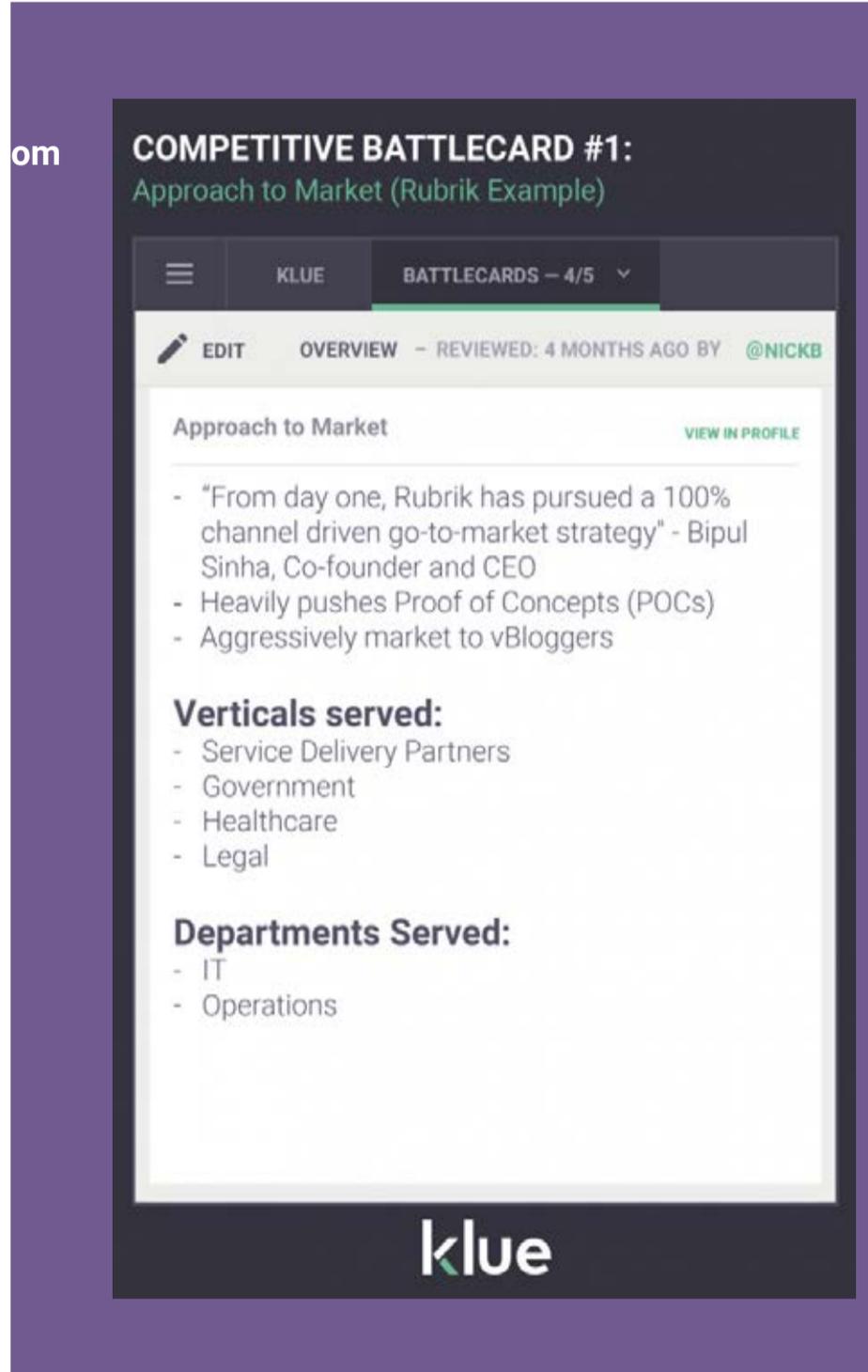
## How to build this sales battlecard

This card should contain details on general approach to market, key clients, verticals served, departments served, and channel partners.

To build your *Approach to Market* card, look at the resources available on your competitor's website:

- Content such as webinars, blog posts, and ebooks will give you an indication of who they are approaching and what value propositions and use cases they focus on.
- Case studies and their client list will add to your understanding of their target verticals and departments served. Look at who is being quoted in their case studies to see who they are targeting with sales and marketing efforts.
- Some companies will directly list their partners on their websites; if not, this might require further research.

We recommend doing a general web search to find additional marketing and sales collateral to flush out your insights on their strategy.



“

*Knowing what to expect from your competitors can help you make better decisions in terms of who to approach, how to approach them, and how to effectively compete against them in the sales cycle.*

”

# COMPANY OVERVIEW BATTLECARD TEMPLATE

## COMPETITIVE BATTLECARD #2:

Company Overview Template

KLUE BATTLECARDS — 4/5

EDIT OVERVIEW — REVIEWED: 4 MONTHS AGO BY @NICKB

Company Overview [VIEW IN PROFILE](#)

**COMPETITOR A LOGO**

**HQ:** Provo, Utah, US  
**Founded:** 2002 Ownership: Private  
**Employees:** ~300  
**Revenue:** \$30-\$50M  
**Investment:** \$70M Sequoia & Accel  
**Known Regions:** US, EU, Asia  
**Corporate Clients:** >5000, Fortune 500  
**Academic:** 95/Top 100 Business Schools

**Solution Overview:**  
Brief overview of the company and their offerings

**Key Customers:**  
Brief round-up of notable clients. These can be separated by US/International or otherwise.

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# COMPANY OVERVIEW

## Competitive Sales Battlecard Template #2

In the last battlecard template, we introduced the *Approach To Market* card. Next, we're discussing the **Company Overview** card. The purpose of this sales battlecard is simply to set the stage. If a sales person doesn't know anything about the company, it gives them a basic sense of who they are.

Tracking how your competitor's revenue is trending, changes in employee count, and recent investment gives you a sense of the scale of the company. Are they a major, heavily-backed threat with a growing client base? Have they recently expanded into a new region?

This card, when used properly, will give you high-level insights about how your competitors are evolving over time. Beyond these insights, the other cards in your full battlecard deck will dive into what you actually need to win deals.

### When to Use / Not Use This Battlecard

#### When Not to Use:

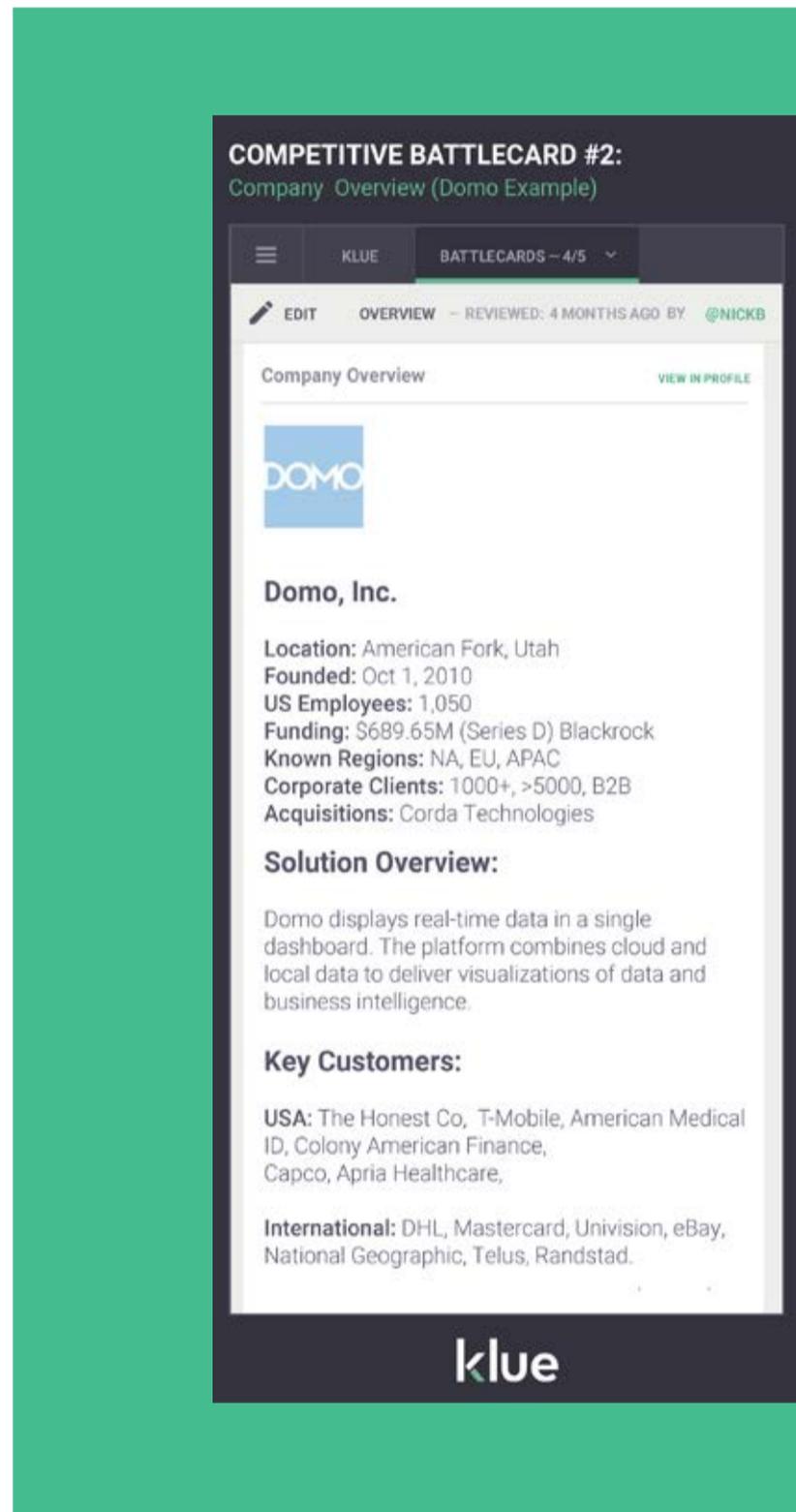
If you face off against four or fewer main competitors, then this card won't be useful. Your salespeople will already be familiar.

#### When to Use:

If you think your salespeople will not know who this competitor is, it would make sense to use this card. This could be a new entrant, or a tier two or three competitor that they don't face off against regularly.

If you have high turnover in your sales force or frequently hire inexperienced sales people who won't have much knowledge of the market, this should be a go-to card.

### How To Build the Company Overview Battlecard



This card should be pretty quick to build. From your competitor's website you should be able to find: logo image, headquarter location, known regions/offices, solution description, and key customers. Crunchbase and LinkedIn can supplement your information with employee count, revenue, investment details and a boilerplate.

# QUESTIONS TO ASK BATTLECARD TEMPLATE

## COMPETITIVE BATTLECARD #3:

### Questions to Ask Template

The screenshot shows a mobile application interface for a battlecard. At the top, there is a navigation bar with a menu icon, the text 'KLUE', and 'BATTLECARDS - 4/5'. Below this is a header area with 'EDIT', 'OVERVIEW', and 'REVIEWED: 4 MONTHS AGO BY @NICKB'. The main content area is titled 'Questions to Ask' with a 'VIEW IN PROFILE' link. The content includes a section for 'Lead Qualifying Questions' with a description and a 'What?' section. It also features a 'What to determine in call:' section with a list of three items and a link to a full list of questions.

EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB

Questions to Ask [VIEW IN PROFILE](#)

**Lead Qualifying Questions**  
Schedule into call to qualify lead.

**What?** A 20 minute call to determine if lead should move forward in sales pipeline

**What to determine in call:**  
Three things:

- What kind of **tools** do you use internally?
- How do you currently handle X in your organization? Who are the **stakeholders**/end users of this solution (# of ppl involved & their roles)?
- What are the main **challenges** with your current process/ tools?

[\\*\\*\\*Full list of intro call questions here\\*\\*\\*](#)

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# QUESTIONS TO ASK

## Competitive Sales Battlecard Template #3

The **Questions to Ask** card is one of the more advanced cards in the battlecard library and is frequently used by many of our clients.

There are two different ways to use this card. We will cover this below.

Both ways of using this card – whether for information gathering or for exposing competitor weaknesses – can be used within your sales playbooks. They aren't mutually exclusive.

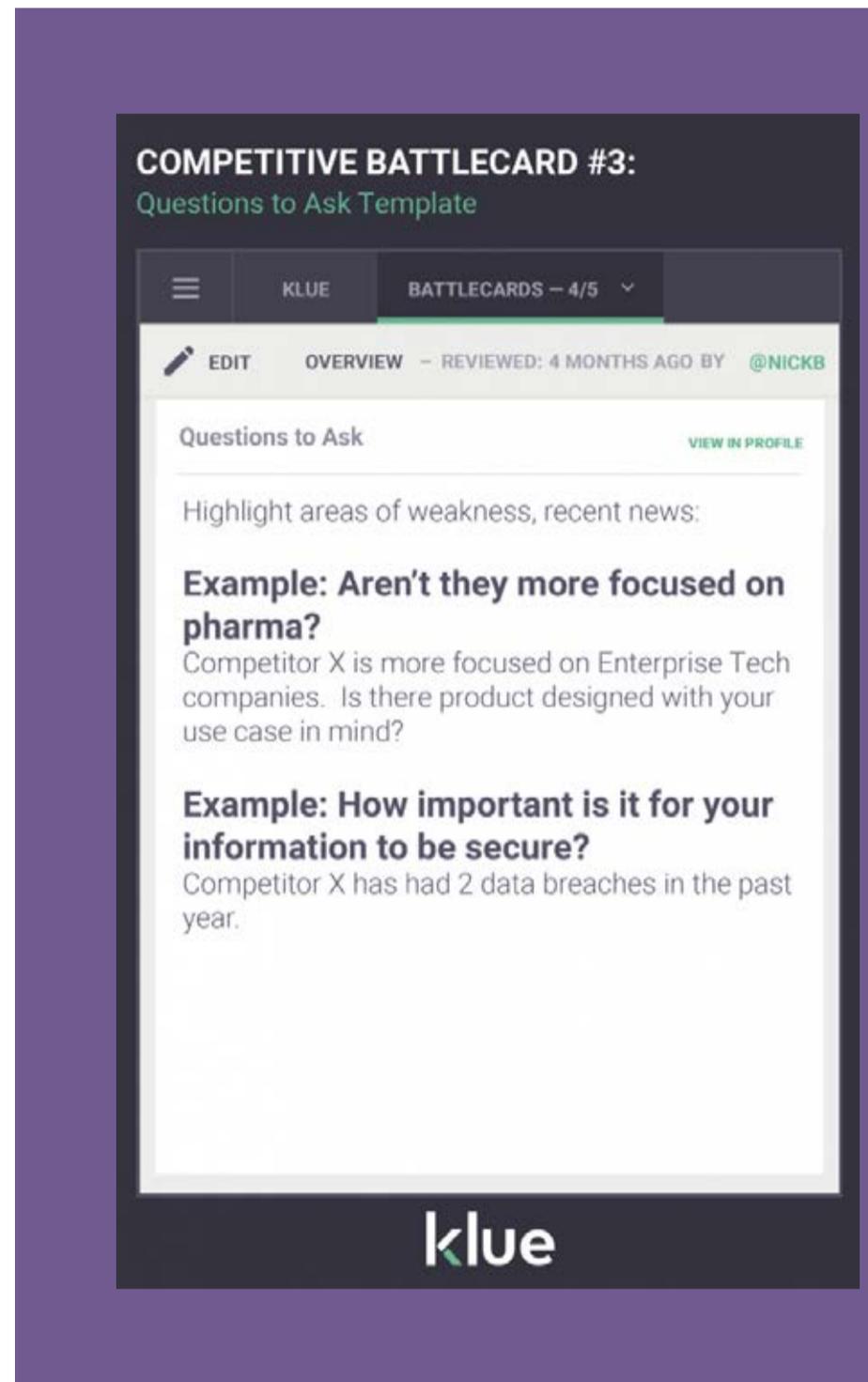
In fact, many choose to use both for the value they each bring to the sales process. Your account executives (AEs and sales development reps SDRs) will deal with different questions.

Remember this when building these cards; you may choose to have variants of each built uniquely for your SDRs and AEs based on their roles in your sales cycle.

### Use Case #1: Information Gathering and Pain Discovery

To steer sales people away from getting into their pitch too soon, the **Questions to Ask** card makes it easy for your sales reps to quickly uncover their prospect's pain by giving them the exact questions to ask to diagnose their needs.

These questions are typically used during qualification (also called discovery) calls. By making it easy for your sales reps to consistently collect certain pieces of information on their leads, it will improve their ability



to hit the points that matter most to closing a deal. It's far more important that your reps understand their prospects' pain than to know all of the details of your competitors' products.

“

*The Questions to Ask card is one of the more advanced cards in the battlecard library and is frequently used by many of our clients.*

”

# QUESTIONS TO ASK

Continued

The *Questions to Ask* card has become increasingly popular as people have shifted sales strategies towards using playbooks – where the pitch for a product is adjusted dynamically rather than being set in stone.

The positioning messages a sales person uses will vary depending on their prospect's problem and unique scenario.

Using the *Questions to Ask* card to uncover these pain points supports this mentality and provides the foundation for battlecards focused on sales strategies.

## How to Build This Sales Battlecard

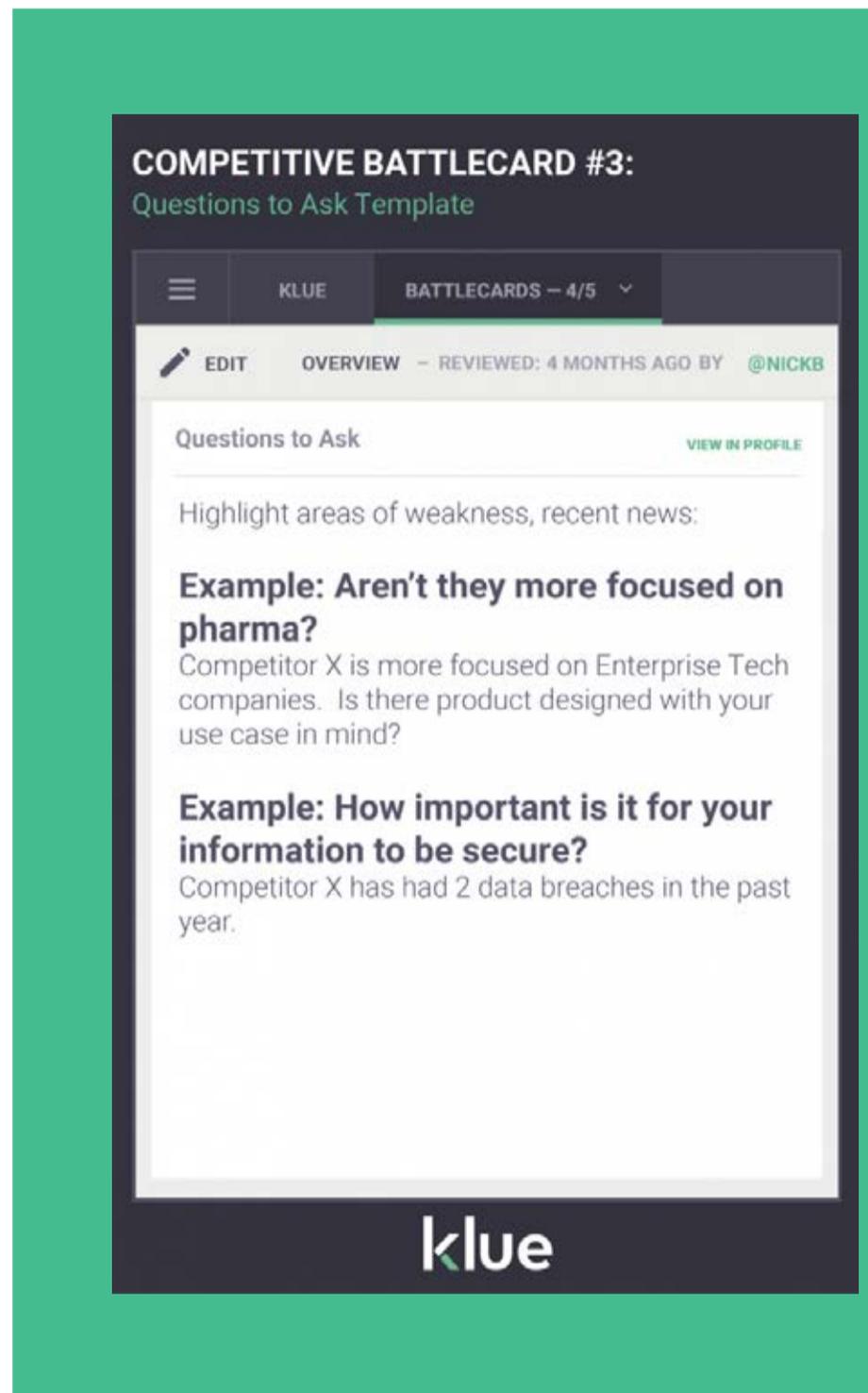
Build this card by crafting questions to help your sales people unearth information on prospects during the qualification stage. As a starting point, seek to understand your prospect's goals and objectives as well as their current situation.

Try providing one to two different variations in how your questions are worded to give your salespeople a couple of ways to rephrase it.

To make sure the right information is being gathered, you may want to list the question(s) followed by a brief description of what information is intended to be discovered.

In our examples provided, one of the cards lists the discovery questions directly in the card with a link out to a document with a longer list of questions.

Depending on the depth of information you collect during qualification, you may choose this approach.



## Use Case #2: De-positioning Questions

The second use case for this card is to assist your sales person to de-position a known competitor in a deal. The questions typically focus on exposing weaknesses where your competitor falls short.

# QUESTIONS TO ASK

Continued

Rely on this card if you know that a competitor has a particular weakness that will not gel well with the person you're selling to.

## How to Build This Sales Battlecard

Our examples for this use case have been built using public reviews on a chosen "competitor". General themes of weaknesses were found by aggregating software reviews from multiple websites.

Develop questions to surface these weaknesses, with an explanation of why each question works and what it helps the salesperson to do/expose.

If you are lacking internal intel on a competitor, this is one way to approach the build of this card, although there are obvious limitations in how accurate and up to date this information will be.

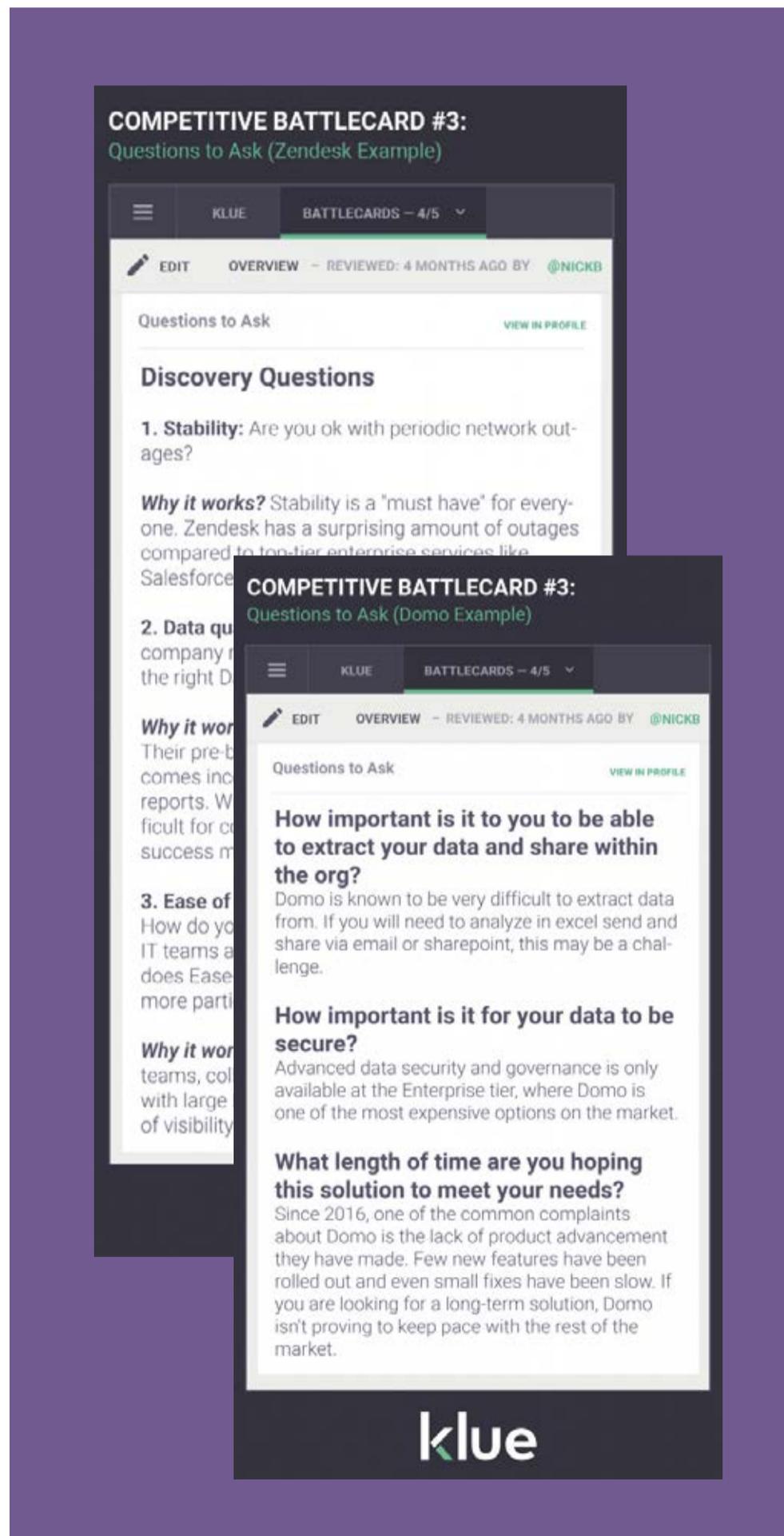
Building this based off internal information should always be your first choice. 80% of your most valuable intel comes from your internal sources because your salespeople face off directly and are able to pull intel directly from prospects.

On the right are two example battlecards.

“

*Build this card by crafting questions to help your sales people unearth information on prospects during the qualification stage.*

”



# PRODUCT OVERVIEW BATTLECARD TEMPLATE

**COMPETITIVE BATTLECARD #4:**  
Product Overview (Template)

KLUE BATTLECARDS - 4/5

EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB

Product Overview [VIEW IN PROFILE](#)

**Product Name & One Liner on Each**

Example: The Qualtrics platform is an all-in-one platform composed of standard and premium modules (additional cost).

**Key Strength:**

Example: Powerful automation rules engine that can be customized to suit clients (almost) every need.

**Key Weakness:**

Example: Customization is required for every module, in every deployment - Typically 6-9 months to deploy.

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# PRODUCT OVERVIEW

## Competitive Sales Battlecard Template #4

The product overview battlecard is fundamental to any sales playbook/battlecard deck.

If your competitor has a product or service offering, you need to know about it. That's what the product overview battlecard is for.

There is however, one additional opportunity in using this card. When it comes to the sales content people look at – this is probably one of the most viewed cards. Right up there with pricing.

### How to Build This Sales Battlecard

You're faced with two ways to approach this card. Option one is to simply input the details on the full product suite offered by your competitor.

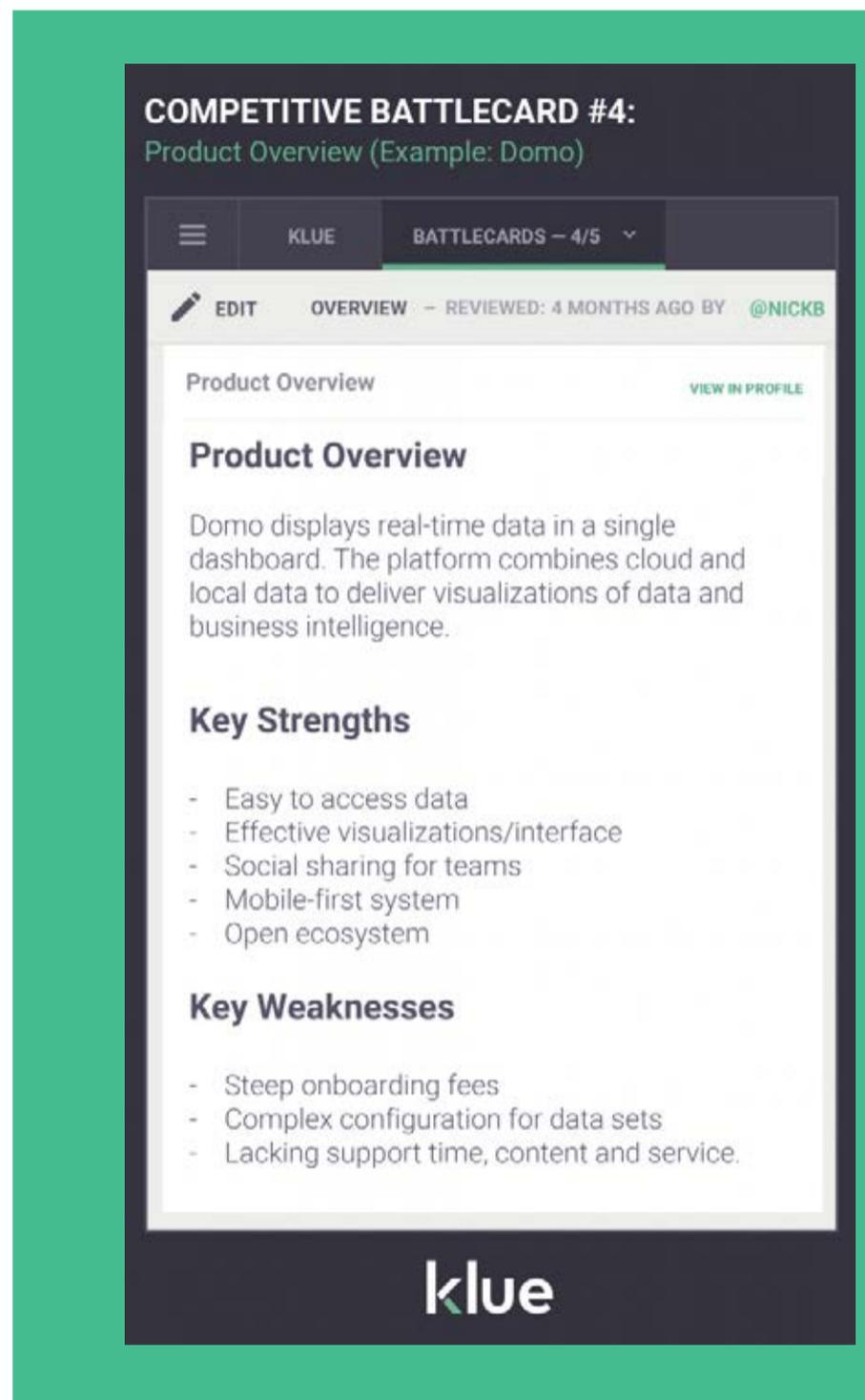
The alternative is to take advantage of the number of views this card will get and use it to reinforce positioning messaging against your competitor.

To build this battlecard you're going to gather a list of the full suite of products offered by your competitor with a short description of each product.

A brief description should give your salesperson an understanding of what the product/service is, and a quick understanding of how the competitor positions this product in the market.

What you don't want to do is build this as a sales facing product or feature comparison card. You don't want to get into feature battles in deals. You want to sell on value.

A product comparison chart might, however, be valuable to your product/marketing teams but as it



pertains to sales; if you've found yourself in a battle over feature there might be a deeper issue that the core value of your solution hasn't been clearly articulated or that you're not talking to the right target.

# PRODUCT OVERVIEW

Continued

## How to Build the Product Overview Sales Battlecard:

Conduct research into your competitor's products. This isn't an easy build. It can be difficult to understand the specifics of a product when you only have access to publicly available information. You will need to decipher their marketing language to understand what your competitor is actually talking about.

Your objectives are to:

**Step 1:** Compile the full list of products offered by your competitor

**Step 2:** Synthesize as much as you can from websites, G2 (Crowd) and other review sites.

**Step 3:** Figure out what the product really offers after stripping away all of the marketing jargon.

This makes up the skeleton for your data. You have a basic understanding of your competitor's product offerings based on information you were able to find across various public channels.

## Understand Your Competitor's Product Positioning Strategy

To compare, you want to understand how both your products and your competitor's products fit into the ecosystem.

Do you overlap in the customer group or is there secondary or tertiary customer overlap? This will influence how you look at different areas of their product.

**COMPETITIVE BATTLECARD #4:**  
Product Overview (Example: Slack)

KLUE BATTLECARDS — 4/5

EDIT OVERVIEW — REVIEWED: 4 MONTHS AGO BY @NICKB

Product Overview [VIEW IN PROFILE](#)

**FEATURES**  
Real-time chat, searchable archives, file storage/sharing, custom notifications.

**INTEGRATIONS**

- 100+ Applications
- Open API
- Most Popular: Google Drive, Asana, Skype, Box, Intercom, Trello, Giphy

**KEY STRENGTHS**

- Killer UI: easy-to-use, easy to onboard, emojis, @mention lookups
- Integrations: 100s of pre-built integrations, including support for Dropbox and Google Docs
- Configurable notifications: fine-tuned by channel, across desktop, email, and mobile.
- Funding: \$340M funding mitigates lack of longevity fear
- Migration: importing tool enables historical migration from competing tools.
- User profiles: multiple accounts/profiles per email address; easily switch between teams.

**KEY WEAKNESSES**

- Expensive: \$7-\$50/user/mo.
- Noisy for large teams: default general channel becomes crowded; too many notifications.
- Limited video and voice conferencing
- No screen-sharing

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By adding strengths and weaknesses directly into the product overview battlecard, you can expose the customer groups where the product won't be a fit.

# WHEN TO ENGAGE/ NOT ENGAGE BATTLECARD TEMPLATE

**COMPETITIVE BATTLECARD #5:**  
When to Engage/ Not Engage (Template)

KLUE BATTLECARDS - 4/5

EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB

When to Engage/ Not Engage [VIEW IN PROFILE](#)

**Go: Areas Where You Will Win**

- Example: Client has a regular history of buying SaaS products. They are quick movers so look to close as quickly as possible.

**No Go: Areas Where You Will Lose**

- Example: Companies <200 people will not be the right target, don't engage.
- Example: Prospect has indicated their #1 concern is analytics. Avoid this, shift the conversation.
- Example: If client is looking for a solution that will automate their entire current workload, it's likely a prospect to avoid.

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# WHEN TO ENGAGE/NOT ENGAGE

## Competitive Sales Battlecard Template #5

### About This Battlecard Template

This battlecard template goes by many names. “When to Engage/ Not Engage”, “Go/ No Go”, “Why We Win/ Why We Lose”. You’ll have your own take on it.

The purpose of the card is to identify when your product/solution is well positioned in a deal, and what situations you’ll want to avoid.

A battlecard template like this becomes most effective when it ties in positioning messages and pivots.

For example, rather than simply stating what conversations to avoid, you need to follow-up with techniques on how to change the conversation.

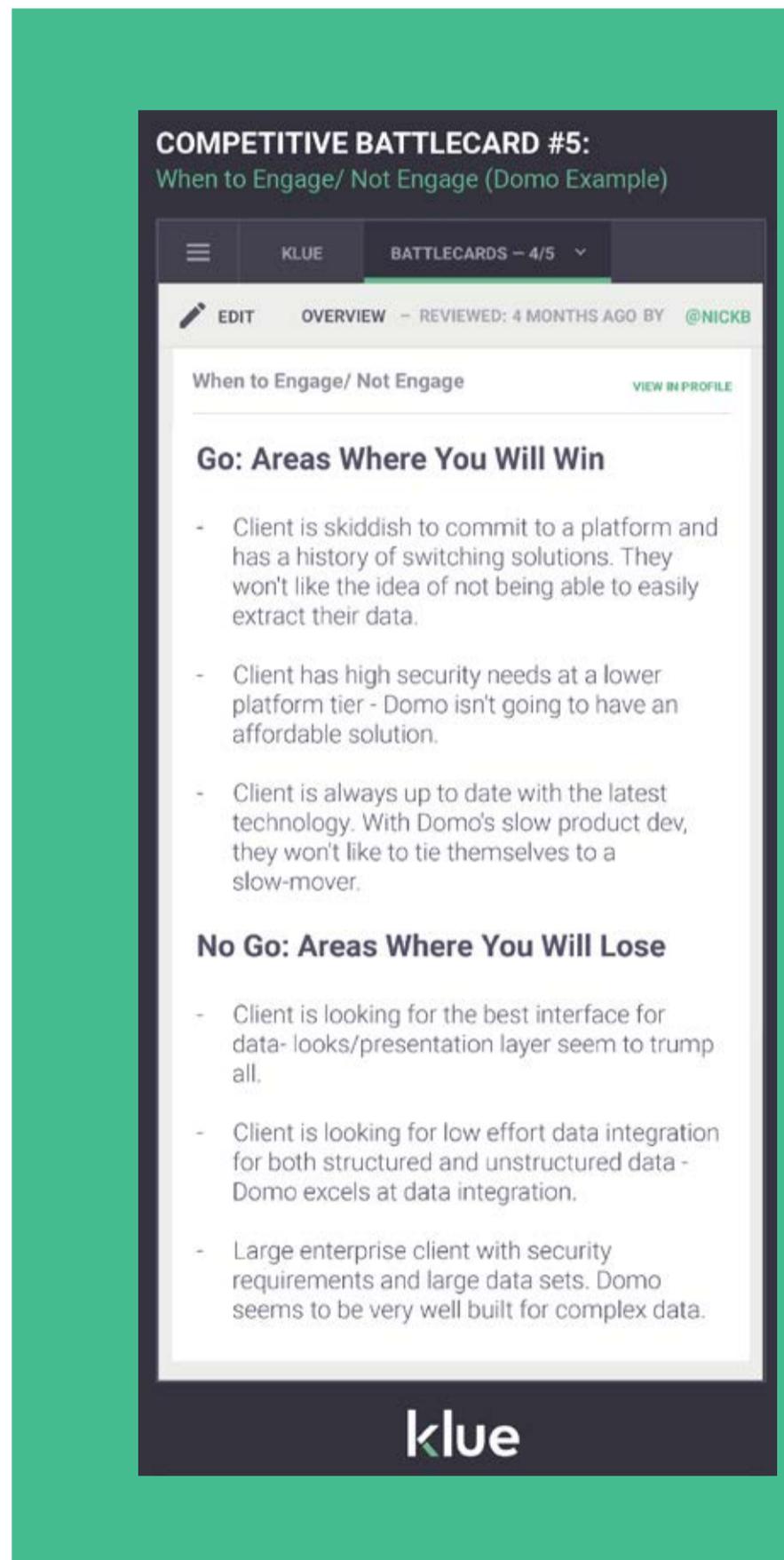
### An Example in Practice

Under “When Not To Engage,” you might identify that feature battles are a no-go zone. That’s common. Beyond stating that it’s not productive to get into a war of features, provide suggested responses.

Reinforce the value statements to pivot the conversation. Elevate the conversation to refocus back to core strengths. Prove ROI with a supporting case study and other sales collateral.

On the other side of this coin, building the “When to Engage” or “Why We Win” portion of this card requires an understanding of what wins deals at your company, and what clients are most likely to close.

Give suggestions on what strengths to reinforce, what use-cases and feature sets are best to focus on. Again, provide advice to sales on what has proven to push deals to close.



# WHEN TO ENGAGE/NOT ENGAGE

Continued

## How to Build this Battlecard

Putting together content for this battlecard requires a deep understanding of your sales process.

Conducting a thorough win/loss analysis of every opportunity would be the best way to surface themes about where you win and lose deals. We've put together a few resources on this topic:

[\[Article\]](#) Win/Loss Interviews Part 1: 5 uncomfortable questions product marketers must start asking in win-loss interviews today

[\[Article\]](#) Win/Loss Interviews Part 2: There's only one reason to do win-loss interviews

[\[Article\]](#) 31 questions you should ask in every win loss interview

[\[Resource\]](#) Win/Loss Checklist

After pulling out themes where you win and lose, it's down to developing your sales strategies and pivots. Provide sales with suggestions on conversational pivots, identify positioning messages to reinforce and always make sure to backup your arguments with proof. Your sales team will need case studies and other sales collateral to prove value and build trust.

“

*A competitive sales battlecard template like this becomes most effective when it ties in positioning messages and pivots.*

*For example, rather than simply stating what conversations to avoid, you need to follow-up with techniques on how to change the conversation.*

”

“

*Prove ROI with a supporting case study and other sales collateral.*

”

# PRICING BATTLECARD TEMPLATE

## COMPETITIVE BATTLECARD #6:

Pricing (Template)

KLUE BATTLECARDS - 4/5

EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB

### Pricing [VIEW IN PROFILE](#)

Per product line - link to evidence on their site, in a paper/article or quote from other reps

#### Licensing: Annual Pricing

- Basic: \$xxxx, 15 users, 12k resp
- Standard: \$xxxx, 35 users, 40k resp
- Division: \$5xxxx, 75 users, 250k resp

#### Services: Annual Pricing

- Service 1: details
- Service 2: details

#### Pricing Strategy

Share any insights on how you can expect this competitor to adjust pricing in deals. If they're prone to price drops during negotiation, give brief insight into how to reposition or link back to other cards in your competitor profile/battlecard.

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# PRICING

## Competitive Sales Battlecard Template #6

We couldn't build competitive battlecards without reviewing the **Pricing** card. The *pricing card* is standard issue for any competitive battlecard deck. It contains information on how your competitor sets their pricing.

The second purpose of this card is to provide Sales with insights into your competitor's pricing strategy and how they use price as a leverage point in deals.

Is your competitor notorious for price dropping? Do they position and price their product as a premium or value offering? This is what you'll want to help your Salespeople understand.

While we recommend that you try to use each sales battlecard as an opportunity to reinforce positioning messages, with the **Pricing** card, your objective is to provide facts on their pricing tiers.

It's possible to provide insight into their strategy; but you wouldn't expect to see positioning statements with this card.

Should you want to reinforce any other points you could instead choose to link back to a **Positioning** card, or to sales support content like proof-points and case studies.

### How To Build a Pricing Battlecard

The first step to building this card is to find all publicly available materials on your competitors pricing. Often times, pricing tiers can be found directly on their website although with enterprise-level products, pricing can be kept offline.



The image shows a screenshot of a competitive battlecard for Rubrik, displayed within the Klue application interface. The card is titled "COMPETITIVE BATTLECARD #2: Company Overview (Rubrik Example)". The interface includes a navigation bar with "KLUE" and "BATTLECARDS - 4/5", and a header with "EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB". The main content area features the Rubrik logo and the following information:

- \$1.3B Market Value
- ~720 employees (according to LinkedIn, '18)
- ~220 Partners
- 4 rounds of funding adding up to \$292M (most recent Aug 2017)
- ~\$100M Annual Run Rate

**Solution Overview:**

Rubrik markets that they offer a "modern" data management platform that unifies backup, replication, search, instant recovery, analytics, archival, copy data management, and compliance in a single secure solution across data centers and public cloud. Rubrik combines backup software and globally deduplicated storage into a single, scale-out fabric.

**Key Customers:**

**USA:** Facebook, JeDunn Construction, Willis Tower Watson, Best Buy, US Department of Energy, Nordstrom, AIG, Williams Sonoma, Chapters Health Systems, NBC Universal, and American Honda Motors.

**International:** the City of Munich, TotalJobs, Netherlands Ministry of Defence, and the UK Cabinet Office.

The Klue logo is visible at the bottom of the card.

# PRICING

## Competitive Sales Battlecard Template #6

If this is the case, you can search on customer review sites, like G2Crowd or even Quora, where you may be able to find direct testimonials from prospects on what they were quoted by your competitor.

Using this information, you will build basic facts on your competitor's pricing tiers. To generate insights into their pricing strategy, you'll need to look internally.

Your sales team has direct contact with your prospects. In deals with known competitors, they are going to be gathering first-hand knowledge on how your competitors' sales team handles pricing.

In deals with known competitors, they are going to be gathering first-hand knowledge on how your competitors' sales team handles pricing.

Finding a way to pull information up from your sales team is critical to gaining the competitive edge.

Using a tool like Klue that allows intel to be collected, curated, and shared across the organization allows you to make use of the internal information that often goes unused in large organizations.

### Using Pricing Intel to Drive Sales Strategy

Take an example from one of our clients. Using Klue to deliver competitive intel to Sales, our client began to win more deals against a particular competitor.

As a result, they started to hear from Sales that the competitor had started dropping prices like crazy to try to claw back their win rate. By knowing that the competitor was going to jump to price dropping as a

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*While we recommend that you try to use each battlecard as an opportunity to reinforce positioning messages, with the Pricing card, your objective is to provide facts on their pricing tiers.*

*It's possible to provide insight into their strategy; but you wouldn't expect to see positioning statements with this card.*

”

go-to move, our client was able to prepare more positioning messages and pivots for their sales team. They could avoid getting into a price war and instead turn the conversation back to finding a values-based solution to the prospect's needs.

Having this sort of heads up for both your competitive intelligence and sales teams, through a pricing battlecard, can have a significant impact on sales performance.

# POSITIONING BATTLECARD TEMPLATE

**COMPETITIVE BATTLECARD #7:**  
Positioning Card (Template)

KLUE BATTLECARDS - 4/5

EDIT OVERVIEW - REVIEWED: 4 MONTHS AGO BY @NICKB

Positioning [VIEW IN PROFILE](#)

## Positioning

**How we position "Competitor A"**

"Positioning statement 1" - Us  
"Positioning statement 2" - Us

**How Competitor A positions us**

"Positioning statement 1" - Competitor A  
"Positioning statement 2" - Competitor A  
"Positioning statement 3" - Competitor A

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# POSITIONING

## Competitive Sales Battlecard Template #7

The **positioning** battlecard provides information on how a company positions their product/service in the market relative to others. It provides insights into how their sales team will pitch the product; highlighting the value they will focus on.

In terms of providing value to your sales team, your sales force needs to know how your competitor is talking about themselves so they can effectively de-position and leverage values within their own product.

Theory being, if you know what your competitor's sales people are going to say, you can decide how to preemptively de-position them.

If you know how your competitor sees themselves in the market, and understand the picture they try to paint for prospects, you should be able to glean clues about their product roadmap. This will allow your product team to make more informed decisions about their own strategy.

### How to Build the Positioning Battlecard

The basic intel needed to build this card can often be found directly on your competitors' websites. Start with blog posts to understand how they discuss their product and the problem that they are trying to solve.

Another strategy is to use a website monitoring tool (such as Klue to track changes on your competitors' websites over time. This can help you to see how they change key messages and other copy on their website giving valuable intel about the evolution of their marketing and positioning strategies.

In some cases you might be able to find pitch videos or demo webinars online that show how they tie their messaging into their sales pitch. If you can access any of these materials, try to also make note of how your competitor positions others in the market.

Can you gather any clues about how they might de-position your product? If so, you'll want to include that intel into your battlecard, with insights on how to correctly pivot the conversation back to your strengths.

Trends over time can be hard to find, but are highly valuable in understanding a competitor's strategic evolution. The act of sourcing and curating this intermittently over time can be a resource-heavy exercise.

A competitive intelligence tool like Klue can help with the collection and curation of dynamic intel such as blog posts, paid SEM keywords, and news releases, in addition to monitoring competitor web pages.

“

*Your sales force needs to know how your competitor is talking about themselves so they can effectively de-position and leverage values within their own product. If you know what your competitor's sales people are going to say, you can decide how to preemptively deposition them.*

”

# TRACK RECORD BATTLECARD TEMPLATE



# TRACK RECORD

## Competitive Sales Battlecard Template #8

The **Track Record** battlecard gives a salesperson intel on how your company performs against a competitor as well as direct insights from the field on recent wins and losses.

This card will typically include the win rate specific to your competitor and sales notes from recent opportunities on how a salesperson won/reasons they lost (pulled directly from your CRM).

**Recent Wins** will share intel on what pushed an opportunity to close – tips on what positioning messages, pricing strategies, etc. worked.

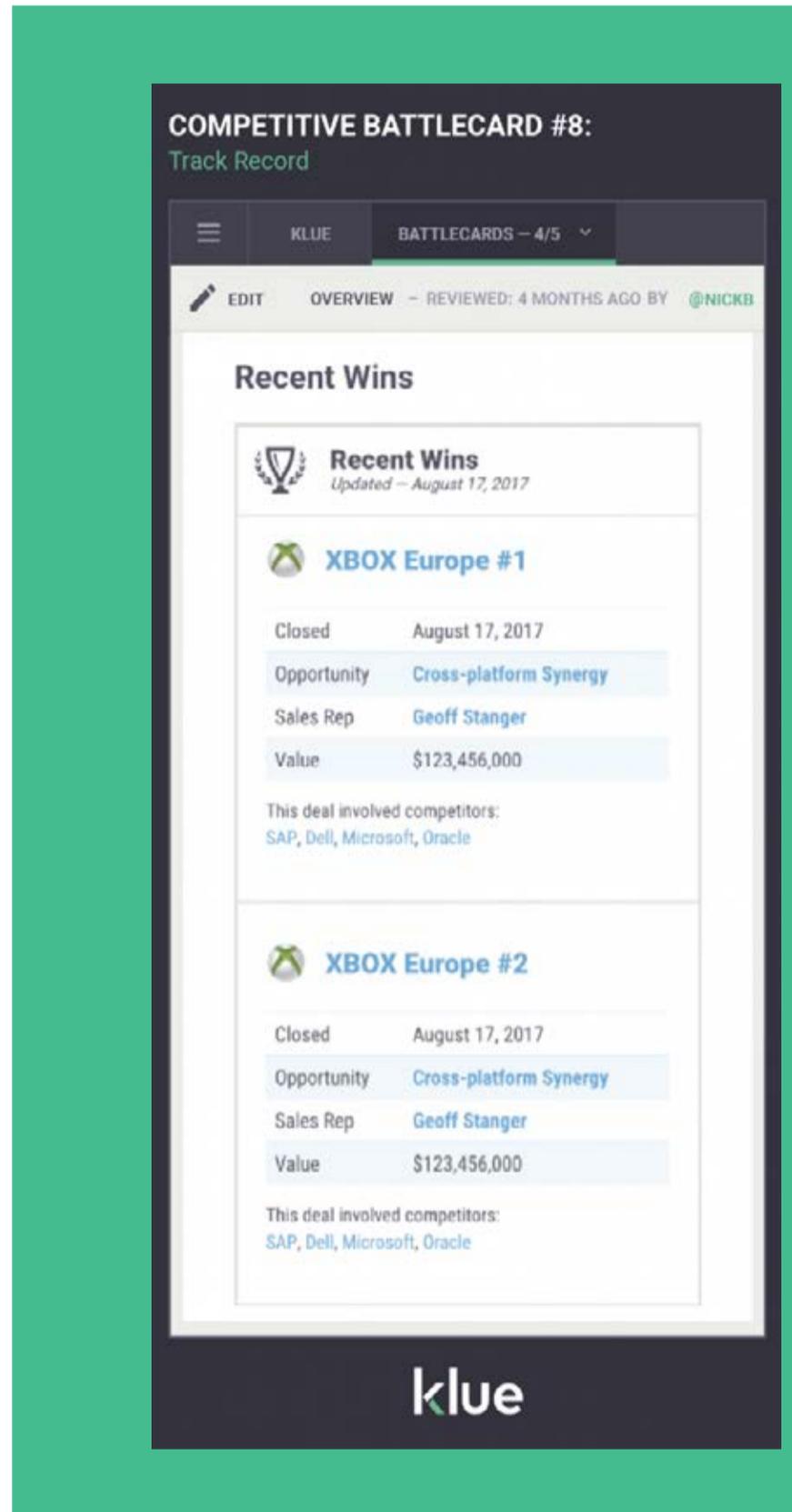
**Recent Losses** will give tips on conversations to avoid, and share anecdotes on where a deal went wrong or what mistakes were made when positioning against a competitor.

Pulling this type of on-the-ground intel into a battlecard is a very effective tool for enabling your sales team.

It's very likely that your sales team is already sharing this sort of intel informally, through email, Slack, Chatter, and other channels.

By pulling this intel dynamically into a card, not only are you ensuring that intel is shared broadly across your sales team; you're guaranteeing that these learnings are formally captured for the entire organization so they can be used to improve sales performance.

Let's walk through a use-case of this card to get an idea of how it works in practice. A salesperson from your company is in a deal against a competitor. The competitor had offered a price far below what the salesperson could match. When he referred to the track records card, he found that another salesperson



has just been in a deal against this competitor. Notes from their win showed that the competitor was offering the basic package at the lower price, but to get to the features that the customer wanted there were a ton of add-ons.

# TRACK RECORD

Continued

Guess who won the deal after finding that information?

People are sometimes afraid of this card because they think it could be demoralizing if the win rate isn't high, and that it might discourage salespeople from proceeding with an opportunity.

However, this card can actually be a great asset. It can be used as a call-to-action to determine when to start revamping CI and where to refocus efforts if you're losing against a competitor consistently.

It can also be a good indicator to your Exec, Product and Marketing departments about issues with product and market that need to be fixed.

Consider sharing this card well beyond your salespeople to teams that can benefit from hearing directly from the field on how your product is faring against competitors.

## How to Build the Track Record Sales Battlecard

With Klue, we're able to pull win rate and recent win notes into battlecards directly from Salesforce. However, if you don't have Klue, you can still pull this data together.

As always, your goal is for your battlecard data to be relevant and fresh, so connecting your battlecard to your win rate metrics report might be the best way to ensure your data is updated at least on a monthly basis.



If your battlecards live in PDF form, updating your battlecards will be painful. But, if they live in Google Docs/ Slides you can at least connect your data to a monthly reporting spreadsheet.

Another recommendation is to connect your card back to specific wins in Salesforce. This will give your sales team the ability to gather more details to prep for their demos and calls. A critical component to a high performing competitive intelligence program is incorporating intel directly from the field.

The *Track Record* battlecard is a useful example of doing this, which can provide value both to your salespeople but also directly to the strategic decision makers in your organization.

“

*This card can be used as a call-to-action to determine when to start revamping CI and where to refocus efforts if you're losing against a competitor consistently.*

”

# WHY WE WIN/LOSE BATTLECARD TEMPLATE

COMPETITIVE BATTLECARD #9:  
Why We Win Template (BambooHr Example)

KLUE BATTLECARD

EDIT OVERVIEW

### Reasons We Win

**Weakness:**  
Freemium model a better entry-point for growing businesses.

Example: Since we offer HR basics for free, we allow clients to scale up as thier business grows.

---

**Weakness 2:**  
Time & scheduling a must-have feature & Bamboo HR is weak in this area.

**Example 2:** Our clients have told us that time & scheduling are the features that matter most. BambooHR does not offer what clients in our industry are looking for.

klue

# WHY WE WIN/WHY WE LOSE

## Competitive Sales Battlecard Template #9

The **Why We Win** sales battlecard is an insightful resource for any company to have, because as the name implies this battlecard is all about how your company wins deals and beats the competition.

In terms of providing value to your sales team, the **Why We Win** battlecard does so by outlining the key weakness of your competitors and by highlighting where and when they should strike.

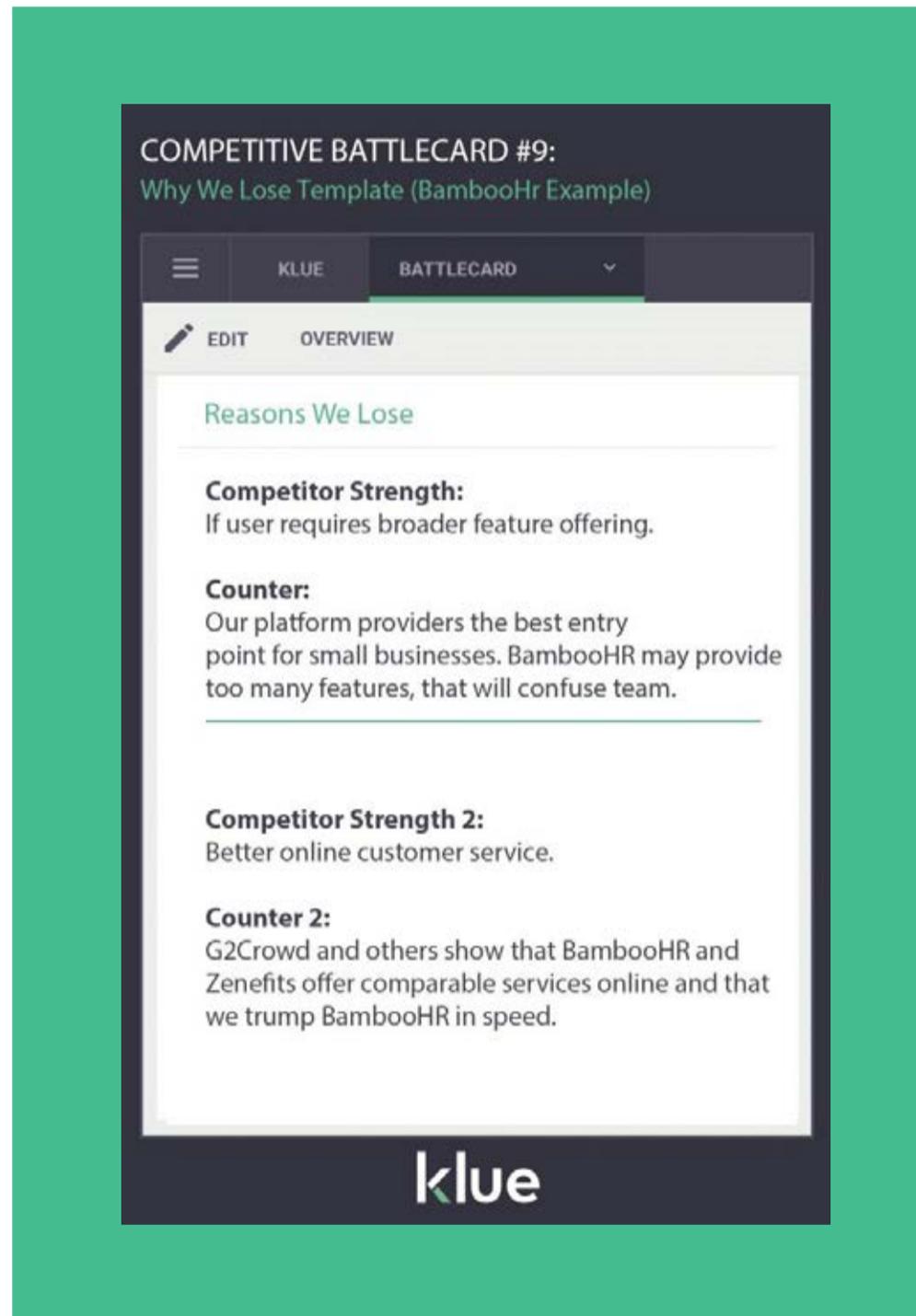
The structure of the **Why We Win** battlecard template is unique because the card presents information through the use of stories. The purpose of this format is to both create context for Sales and to enable them to use real, concrete examples to prove why they are better than Company X, Y, or Z.

Formatting the **Why We Win** battlecard like this helps put a personal touch on your sales pitch and allows for a bit of name dropping, which helps build credibility.

### How to Build the **Why We Win** Sales Battlecard

The process of putting together a standout **Why We Win** battlecard is straightforward. You need to keep the information clear, digestible, and have examples with key takeaways.

To show how simple setting up a **Why We Win** battlecard is, check out the following quick two-step example.



**Step 1:** Come up with a list of your competitors' key weaknesses. This could be anything from workflow functionality to reporting, and will vary based on your industry.

“

*The structure of this battlecard is unique because the card presents information through the use of stories.*

”

# WHY WE WIN/WHY WE LOSE

## Continued

**Step 2:** Survey your sales team for recent win stories that highlight competitor's weaknesses and support your strengths.

Example: **Competitor X** is weak on workflow functionality. The addition of a new category is bulky and time consuming.

Story: Our client estimated that the same task took him 50% less time using our product rather than the competitors.

### "Why We Lose" Sales Battlecard Template

It may be hard to admit, but there are some aspects of your product or service that your competitors are better at.

However, if you have tool (like a **Why We Lose** battlecard) to de-position your competitors, these strengths can become insignificant.

The **Why We Lose** battlecard is quite the opposite of the **Why We Win** battlecard outlined above. The purpose of the **Why We Lose** battlecard template is to educate Sales on your competitor's key strengths and have information or stories already on-hand to derail these strengths.

For example, say you know your competitor has a better reporting system than your company and it gets brought up during a sales call. Don't panic! Every company is going to have something they are good at.

What is important is for Sales to know exactly which story to tell to devalue that exceptional product or service.

### How to Build the *Why We Lose* Battlecard

Building a **Why We Lose** battlecard is just as easy as building a **Why We Win** battlecard template.

All you need to do is identify your competitor's key strengths and have a story to derail, or devalue these claims.

Using examples or customer feedback will be your best bet to getting this message across. These stories will help you subtly brag about your company from a third-party perspective.

This lets prospects know that other clients, not just your internal team, are pumped about your offerings.

To show how simple setting up a **Why We Lose** battlecard is, check out another quick two-step example below.

**Step 1:** Come up with a list of your competitor's key strengths.

**Step 2:** Find a story, or source customer feedback that dilutes your competitor's strengths.

Example: **Competitor X** will try to lead the client to focus on reporting as the critical need. Refocus the conversation to workflow and error minimization.

Story: Reporting is always better when the data is accurate.

Our clients have told us that the competitor's product is known to be bulky and creates a lot of opportunity for errant entry.

# TACTICS TO ATTACK AND DEFEND BATTLECARD TEMPLATE

COMPETITIVE BATTLECARD #9:  
Defend Battlecard (Vend Example)

KLUE BATTLECARD

EDIT OVERVIEW

### Competitors Strengths

**Cost is Low**  
Vend is known to have issues tracking competitors.

iQmetrix is integrated end to end so you can easily monitor what customers are returning.

**How do we devalue these strengths?**  
The pricing is done in USD and does not accomadate for other countries like Canada.

The product has issues factoring in expansion or growth.

New stores will change inventory which is cumbersome and not easility updates.

klue

# ATTACK AND DEFEND

## Competitive Sales Battlecard Template #9

### What are *Attack* and *Defense* Sales Battlecards?

Every sales team should have access to competitive content that supports them in defensive tactics, navigating objections and challenges about their competitors' strengths.

They'll also benefit from learning attack-style cards which train them to be on the offensive and to close deals by reinforcing their product's strengths and aligning that to customer needs.

We've built a full library of sales battlecards that fit into these two categories which will arm your salespeople to outperform the competition.

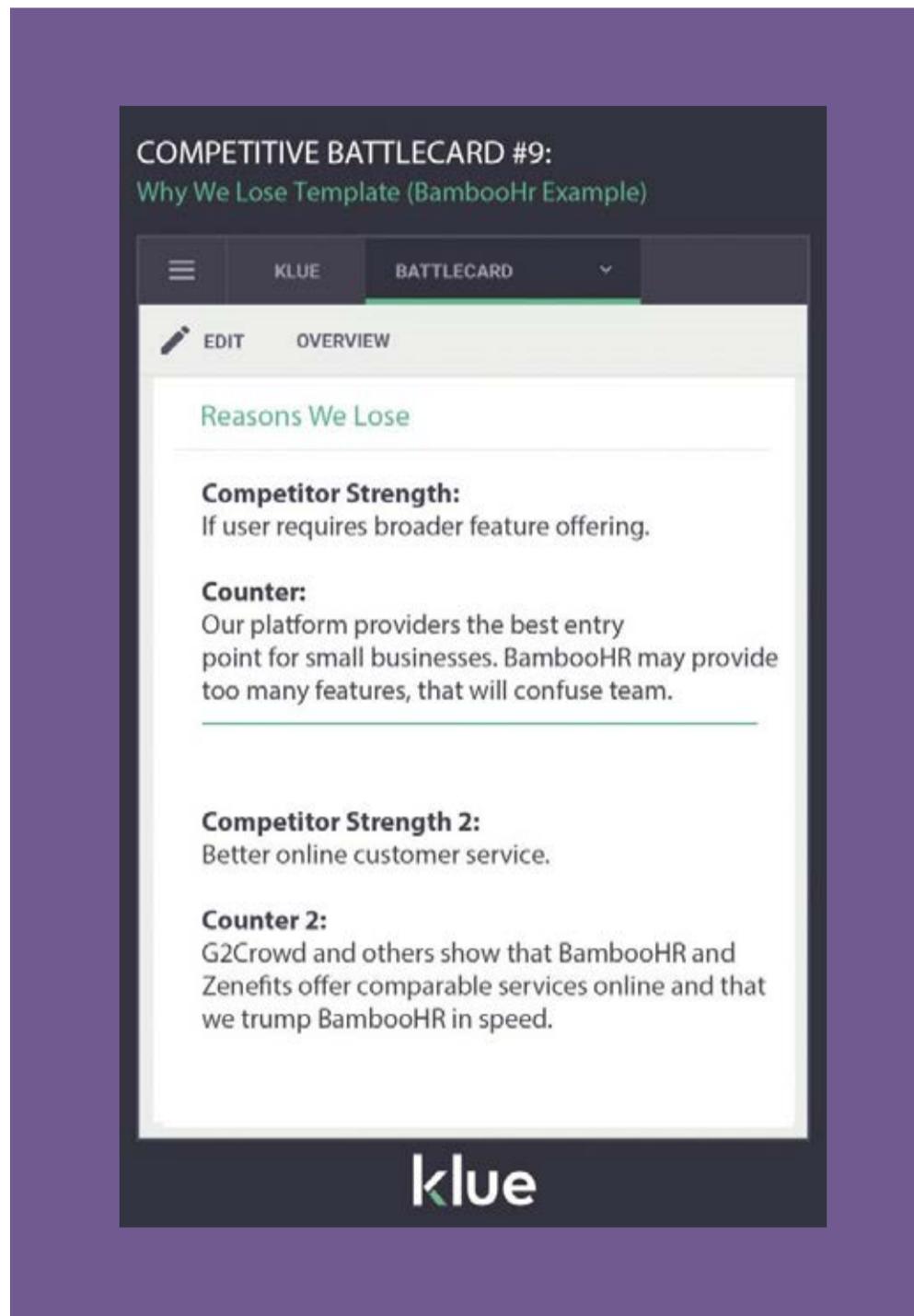
### Defense-Style Battlecards

The main advantage of having a well-defined and curated defensive battlecard is to give your sales reps a clear picture of what claims your competitors are making.

If you know your competitor's strategy you are more likely to be able to defend your weak points and attack using your strengths. It's important for your sales reps to know how your competitors are commonly trying to position you in the market.

Defensive battlecards will start by acknowledging the common ways in which your competitors attempt to position you, or the common claims they will make in the sales process.

They will include tactics, messaging, and strategies to quickly dismiss those claims, and refocus on aligning your solution to solve their pain.



### How do you Build "Defense" Sales Battlecards?

There are a number of cards that belong in your "defense" arsenal. Your defense sales battlecards should include reasons why you lose, re-framing messages, and objection handling techniques, along with customer testimonials to help minimize your weaknesses and defend your strengths.

# ATTACK AND DEFEND

Continued

There is no set in stone technique to build the perfect defense battlecards, but rather a set of ideas to help your company create sales battlecards that will work best for your team.

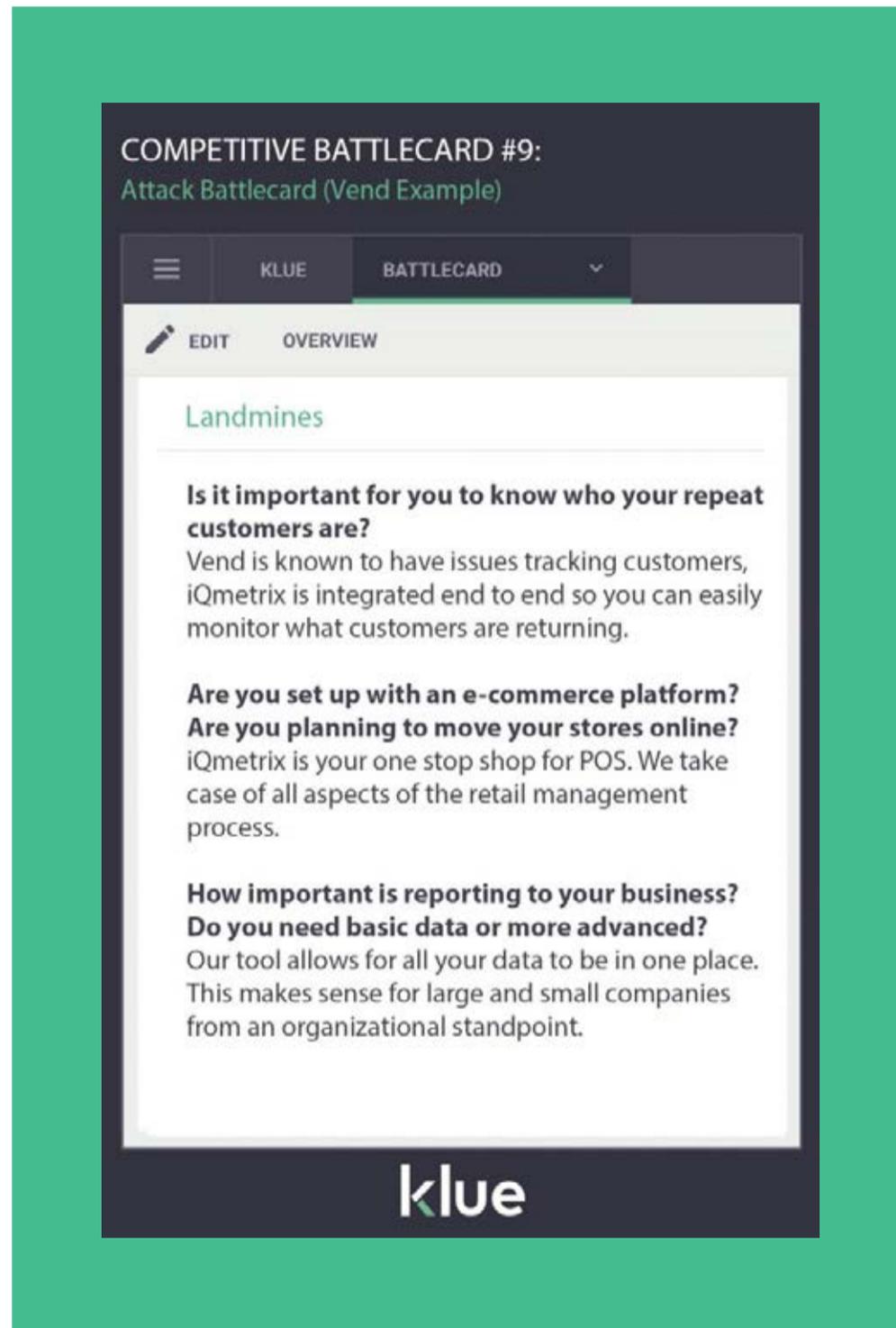
Which cards will be most effective is always dependent on your industry, your competitors, and your own position in the market.

We recommend that when you start to build your defense battlecards that you begin by compiling a list of your competitor's strengths. This information can be found on your competitors' websites, or internally amongst your sales team.

Understanding why you lose to competitors will be the foundation for building all of the "defense" sales battlecard types.

## Attack-Style Battlecards

One of our favorite sales tools are attack battlecards. These cards typically include tips on how to lay landmines against competitors before they become a threat, strengths to prioritize, and other positioning messages that can set up your sales reps for success. In sports terms, this is your offensive playbook that will win you deals.



“

*Give your sales reps a clear picture of what claims your competitors are making.*

”

# ATTACK AND DEFEND

Continued

## How do you Build “Attack” Sales Battlecards?

Creating an attack battlecard is the exact opposite of building a defense battlecard because you are going in the for kill. Rather than being on your heels, this is a proactive toolset – that puts sales reps on the offense by using your strengths to tell a story about why your solution is the best option.

For comparison purposes, an attack battlecard is like a formal resume, where you highlight every aspect of your professional career in the best light possible.

Attack battlecards start by listing out all of the strengths that your company has and then follows up with examples, customer testimonials, landmines, and pricing to support your claims

Our tip for curators is to start building your attack battlecard by conducting a win-loss analysis to first generate a list of reasons why you win.

This will help identify your strengths, which can later be broken down into specific competitive sales battlecards such as *Why We Win*, *Key Strengths*, or *Landmines to Lay*.

“

*One of our favorite sales tools are **attack battlecards**. These cards typically include tips on how to **lay landmines** against competitors before they become a threat, **strengths to prioritize**, and other **positioning messages** that can set up your sales reps for success. In sports terms, this is your **offensive playbook that will win you deals**.*

”

# PREEMPTIVE ADVANTAGE BATTLECARD TEMPLATE

## COMPETITIVE BATTLECARD #10

### Preemptive Advantages Example



KLUE

BATTLECARD



EDIT

OVERVIEW

### Pre-emptive Advantages

Key strengths that create the filter by which the prospect will view competitor's pitches; focuses on your key advantages

#### Example:

Any solution should have the ability to execute both qualitative and quantitative research, without it you end up needing two systems to do the job of one and you lose the advantage of data being carried from one type of study into another to reveal new insights and reduce the size of subsequent studies.

#### Purpose:

Lead prospect to understand that Competitor X's system will not support everything they want to do and force them to buy a secondary product.

klue

# PREEMPTIVE ADVANTAGE

## Competitive Sales Battlecard Template #10

The Preemptive Advantage sales battlecard is a way to help your Sales team eliminate the competition before they are even brought in the conversation.

This is done through a series of questions, and statements that will help your salespeople set the lens by which the prospect will view your competitors.

This filter should highlight how unique your company is and how beneficial your specific offerings are.

The end goal is to differentiate your company from everything else that is on the market and to put yourself on a pedestal from the get-go.

Set up is key to successfully gaining a preemptive advantage over your competition.

So, as a result we have outlined the key points to focus on when building this sales battlecard in the graphics below.

### How to Start Building Your Preemptive Advantage Sales Battlecard

When starting to build your own Preemptive Advantage Sales Battlecard, the key thing to first focus on is creating positive dialogue that can set yourself apart from the competition.

It shouldn't matter which competitor you are up against because Sales should be able to deposition their selling points to the prospect just hearing their pitch.

### What to Focus On

- **Don't create confrontation** between you and your competitor. Instead, **focus on uncovering weaknesses** through conversation.
- Always lean the conversation **towards your advantages**. This should happen even before a competitor is even in the picture.
- **Backup your claims** with solid information. Do your **research** and be prepared.

# LANDMINES TO LAY BATTLECARD TEMPLATE

COMPETITIVE BATTLECARD #11  
Landmines to Lay - Template

KLUE BATTLECARD

EDIT OVERVIEW

Landmines to Lay

Landmine 1  
Why it works?

Landmine 2  
Why it works?

Landmine 3  
Why it works?

Landmine 4  
Why it works?

Landmine 4  
Why it works?

klue

# LANDMINES TO LAY

## Competitive Sales Battlecard Template #11

### What's the Purpose of a Landmine

When a competitor is brought up in a deal, one of the first things you will want to do is de-position them. A common approach that a salesperson will use to do this is known as "laying a landmine".

A landmine is used to fully expose a competitor's weaknesses, so the prospect now has to make a decision between a deficient product (aka your competitor's) and a more complete product.

Typically, the battlecard will consist of a list of landmines in the form of questions or statements.

The purpose of these questions and statements are not to explicitly call out the competitor, but to provide the prospect with the information necessary to confirm that this is a weakness.

### How to Build a *Landmines to Lay* Sales Battlecard

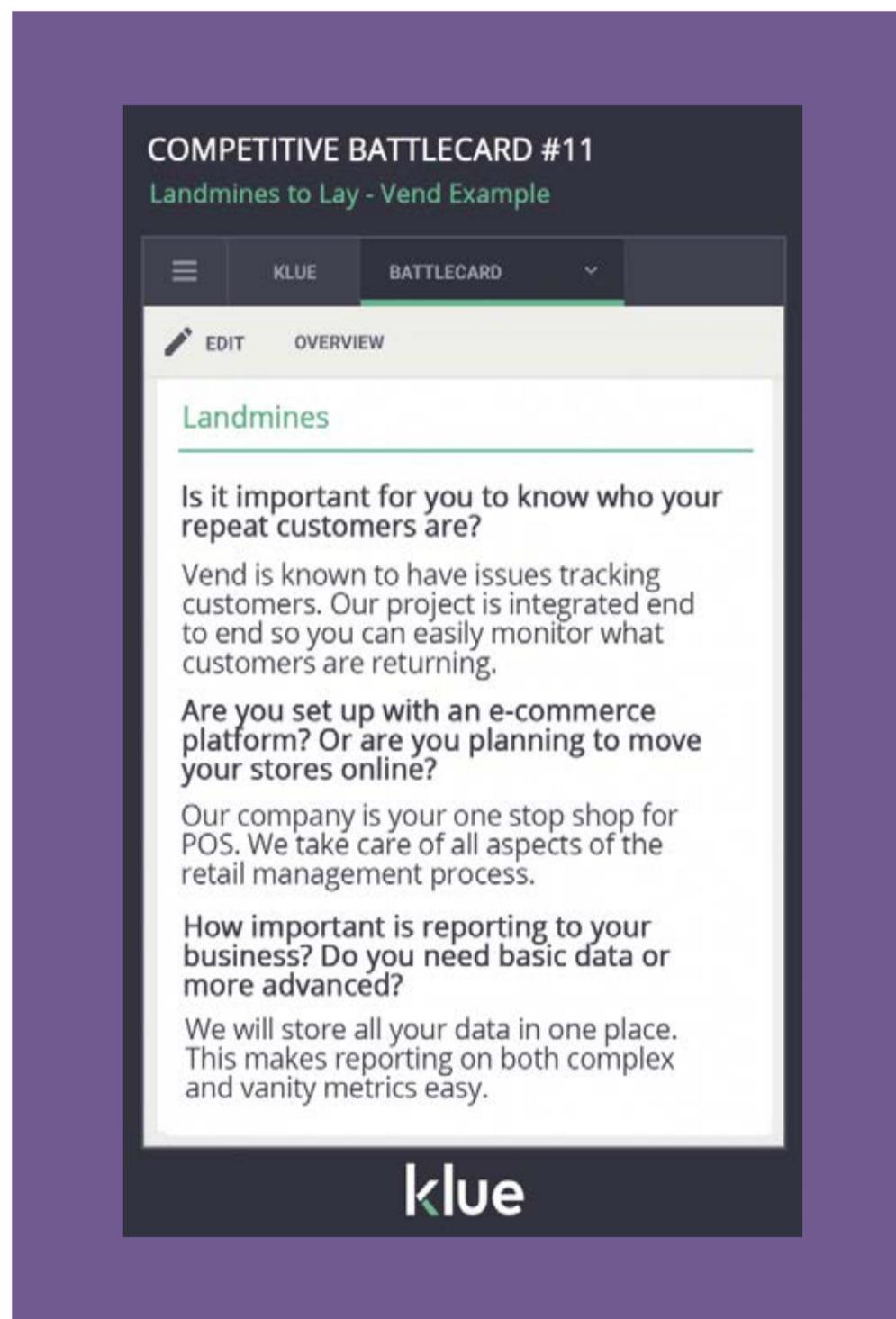
The ***Landmines to Lay*** competitive sales battlecard can be set up in multiple different ways depending on what kind of information you have on the competitor. We'll focus on two formats for this post:

The first format starts with a provoking question that exposes a competitor's weakness.

We've seen the more experienced teams add a "why ask this" explanation below the question to provide context.

### For Example:

**Question:** How important is it that your site is always up and running? Does downtime have a financial impact on your organization?



**Why ask this?** *Competitor X* has had two outages in the past year which have resulted in their customer sites going down for four hours each (add links to the articles documenting the outages).

We haven't seen anything in more recent releases that suggest they have fully resolved the issues. We have had zero outages since we started and make that a focus during all of our releases/launches.

# LANDMINES TO LAY

Continued

The second way to set up a *Landmines to Lay* battlecard is to start with a power statement and then follow it up with a “why this is important” explanation.

The purpose of the power statement is to quickly set your competitor up for failure, by helping your prospect craft their own negative opinion about this competitor.

After all, laying a landmine isn't about starting a war with your competitor, but rather having your prospect come to their own conclusion about their weaknesses.

## Example:

**Statement:** Data accuracy and freshness is critical to good analysis, especially in this industry.

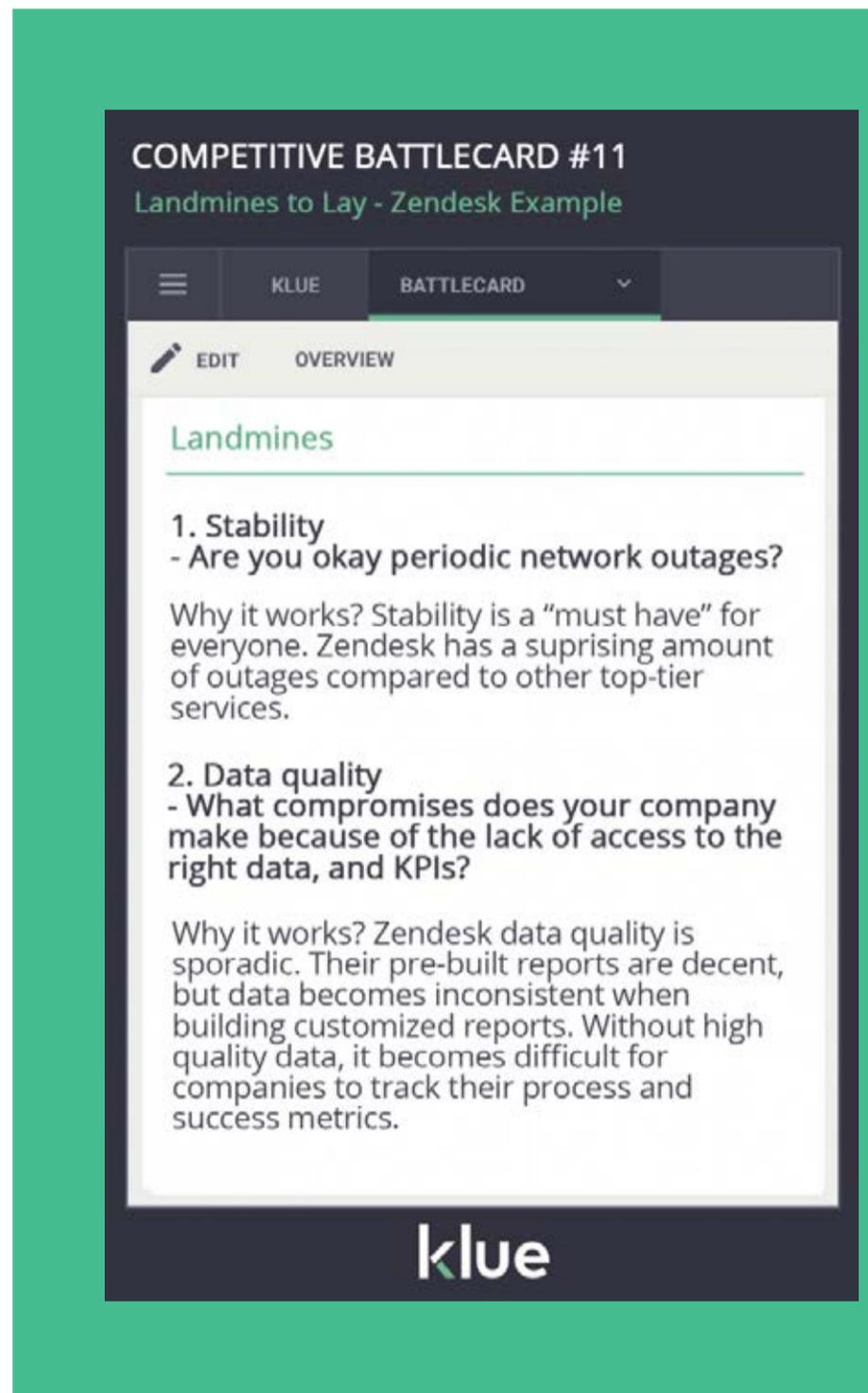
**Why this is important:** *Competitor X* has minimal integrations with key data sources, and other customers who have switched from them to us have said the integrations are slow and buggy.

We have more native integrations with key data sources and have a professional services team who will work with you to get you up and running.

## Final Tips & Tricks

There is no set-in-stone optimal time to lay your landmine, as every sales call will have a variety of nuances that will change the course of the conversation.

However, if a competitor is in a deal, you can bet they have set a landmine for you...don't wait too long or you'll find that you're the one on the outside of the discussion trying to find your way back in.



“

*When a competitor is brought up in a deal, one of the first things you will want to do is de-position them.*

”

# COUNTER FUD BATTLECARD TEMPLATE

COMPETITIVE BATTLECARD #13  
COUNTER FUD

KLUE BATTLECARD

EDIT OVERVIEW

**Common FUD (used by competitors)**

Insert first example here.  
"Competitor X will claim that our on-boarding process for new clients is too slow."

Insert first explanation here.  
Competitor X will say this because their on-boarding process is less rigorous and therefore 2 days quicker. counter this seeded fear by explaining our superior security procedures and the set up time required to make sure their information is secure.

Insert next example here.  
"Competitor X will claim ..."

Insert next explanation here.  
Competitor X will say this because ...

klue

# COUNTER FUD

## Competitive Sales Battlecard Template #13

### What is the Counter FUD Battlecard

When a competitor is involved in a deal, they are likely to plant fears, uncertainties, and doubts about you with your prospect. These fears, uncertainties, and doubts (FUD for short) create hesitation in the minds of your buyers and negatively affect their perception of your products and/or services. The **Counter FUD** sales battlecard template gives your reps tools to navigate these claims.

### Building the Counter FUD Battlecard

When you know a competitor is in a deal, you know they'll be saying bad things about you. That's a given. Navigating those claims is the crux of what the **Counter FUD** battlecard sets out to do.

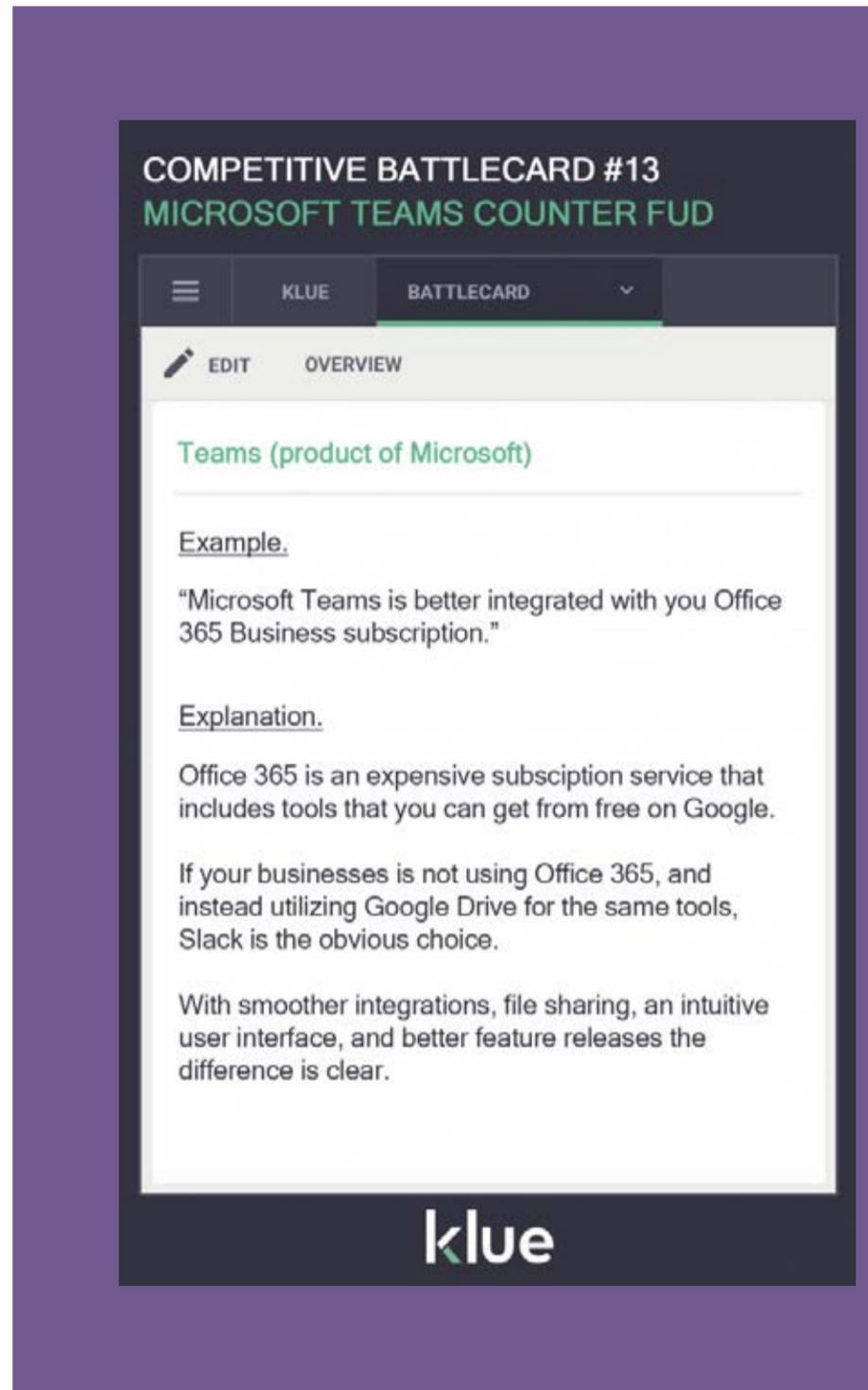
The first step to navigating competitors in a deal is to identify them. Once you know which competitors are in a deal, your first tactical path is to establish preemptive advantages.

Despite doing this, your competitors are still going to seed FUDs with your prospect. You should already know the common FUD statements used by your top competitors.

These FUD statements are the first things you need to build 'compete content' on since they're the most often faced. Make sure all reps know how to handle these most common FUDs as a starting point.

Over time, new FUD statements will arise as your competitors find new ways to de-position your company. It's not always worth addressing each and every one. Figure out which ones have a real impact on deals, then consider how to address them.

To start building this battlecard, we suggest narrowing down three to five of the most common FUD statements your sales team comes up against per competitor, and then provide an explanation for each



statement. This explanation should always provide context and include a counter statement. Use the following tips when developing your counter statements:

**Reinforce Positioning:** Reinforce how your reps should be positioning you in the market. You may need to work with Marketing to make sure your positioning strategies are aligned.

# COUNTER FUD

## Continued

**Brush off and reframe:** Directly addressing can provide merit to FUD statements. Use this opportunity to pivot or reframe how the prospect is viewing you.

For example, if your competitor claims you're "just a small company not able to serve robust client needs," you could counter by pointing out their "size" is made up of largely marketing/sales people. Then, follow up by pivoting the conversation to point out that your smaller team is focused on driving a product better suited to their niche use cases.

**Proof-points:** Use proof-points to back what you have done. For example, using the previous competitor claim that your company is "small", counter by demonstrating success with enterprise customers, growth pace, and iteration of the product.

Don't be afraid to address concerns. The best way to do it is to reposition without directly responding to the claims. Every opportunity to answer a question is also an opportunity to reframe the issue and create your own narrative.

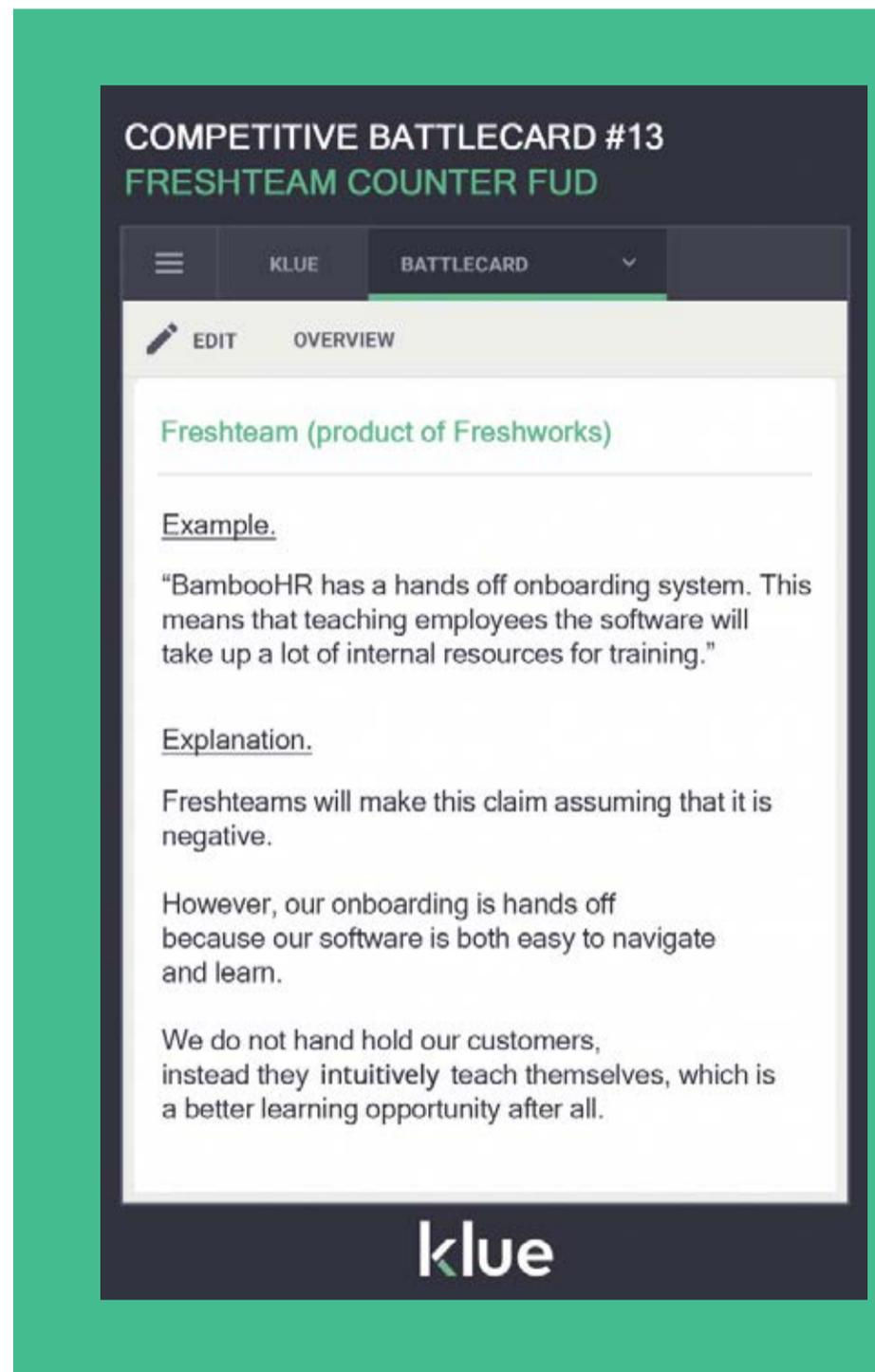
**Example 1:** Slack with FUD statements from Microsoft Teams. (see previous page)

**Example 2:** BambooHR With FUD statements from Freshteam. (see right side of page)

## Word of Caution

When using or countering FUD statements, it's important to remember that it's not about being combative or negative toward a competitor. That's not an approach we recommend you use.

Seed doubt in your prospects mind about your competitors' ability to deliver, and highlight where your product is superior. Remember that building trust with



your buyers is far more important than pointing out your competitors' shortcomings.

The best practice in building counter FUDs is to always validate these FUD statements with a minimum of three sources, before including them on your sales battlecard. We suggest taking a look at customer stories, talking directly to the sale rep who encountered this FUD, and looking at review sites for validation.

# HOW TO SPOT A COMPETITOR BATTLECARD TEMPLATE

The screenshot shows a digital interface for a battlecard. At the top, it reads 'COMPETITIVE BATTLECARD #12' and 'How to Know if Competitor X is in the Deal.' Below this is a navigation bar with 'KLUE' and 'BATTLECARD' tabs. Underneath, there are 'EDIT' and 'OVERVIEW' options. The main content area is divided into two sections: 'Common Terminology' and 'What They'll Say'. Each section has a placeholder for a quote and a brief explanation of its significance.

COMPETITIVE BATTLECARD #12  
How to Know if Competitor X is in the Deal.

KLUE BATTLECARD

EDIT OVERVIEW

**Common Terminology**

Insert common terminology here.

Common phrases, lingo, or jargon that are as unique as possible to your competitor.

Provide brief context about what each term means and the significance behind it.

**What They'll Say**

Insert competitor quote here.

List and describe key quotes that your competitor is known to say specifically about your company.

Provide a brief explanation that will help your Sales team deposition this point.

klue

# HOW TO SPOT A COMPETITOR

## Competitive Sales Battlecard Template #14

The purpose of the **How to Spot a Competitor** sales battlecard is to set your sales reps up with strategies and tools to identify which competitors are in a deal early in the sales cycle.

Identifying competitors early also allows reps to do their research into your track record against a competitor, and come to calls prepared to handle expected objections and with specific questions to ask to de-position competitors.

### Why This Sales Battlecard is Important

Every salesperson can attest to that defeating, lump-in-your-throat moment when they realize a competitor is in the deal and might be edging you out.

To make matters worse, often you realize a competitor is involved too late in the sales cycle, making it difficult to recover.

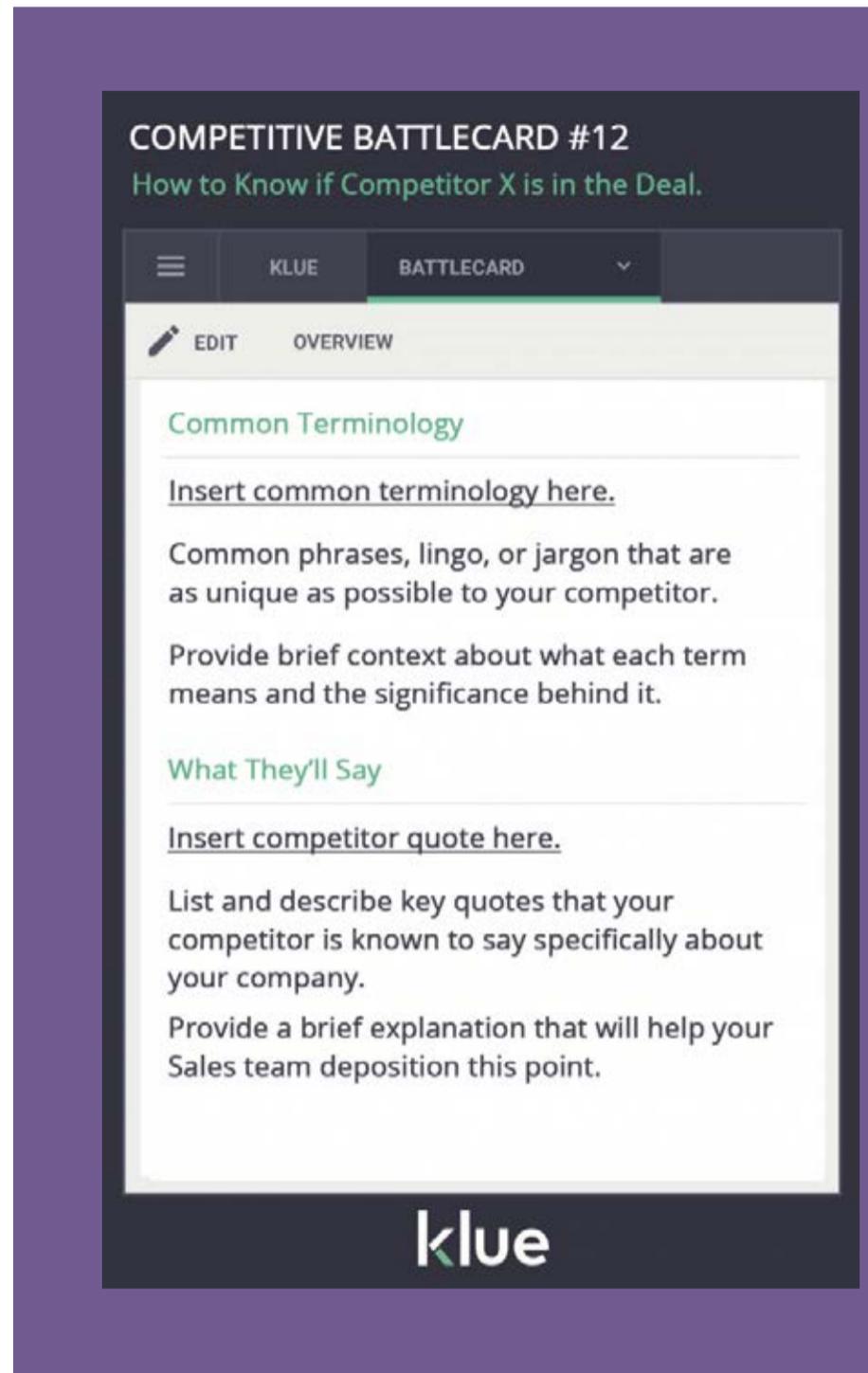
The goal of the **How to Spot a Competitor** battlecard is to prevent the above scenario from happening, by setting Sales up with key identifiers and tools to enable them to discover who's in a deal as early as possible.

By identifying competitors early on, the rest of your competitive battlecard strategies can be used during the interest/evaluation stages of the sales cycle.

If competitors are being identified in later stages, reps will have a much harder time steering the conversation

### Building the **How to Spot a Competitor** Battlecard

The **How to Spot a Competitor** battlecard is broken down into two easily digested sections. The first is



how to identify competitors using lingo and terminology unique to how a competitor describes their solution. The second covers ways to identify a competitor based on what they commonly say about themselves and about you.

You'll want to prepare your reps to be listening for both types of clues and to recreate this sales battlecard for each of your main competitors.

# HOW TO SPOT A COMPETITOR

Continued

## Section 1: Common Terminology

The core focus of this first section is to identify the lingo and terminology that is frequently used by your competitor. Ideally, these keywords will be unique to your competitor and can often be found on their website, collateral, or pitch.

You can do the marketing analysis on your own but to get insights about their pitch you will likely have to seek out sales reps to understand what tribal knowledge they hold about how your competitors position themselves in the market.

Oftentimes, competitors have terms they commonly use related to the market or industry they work in.

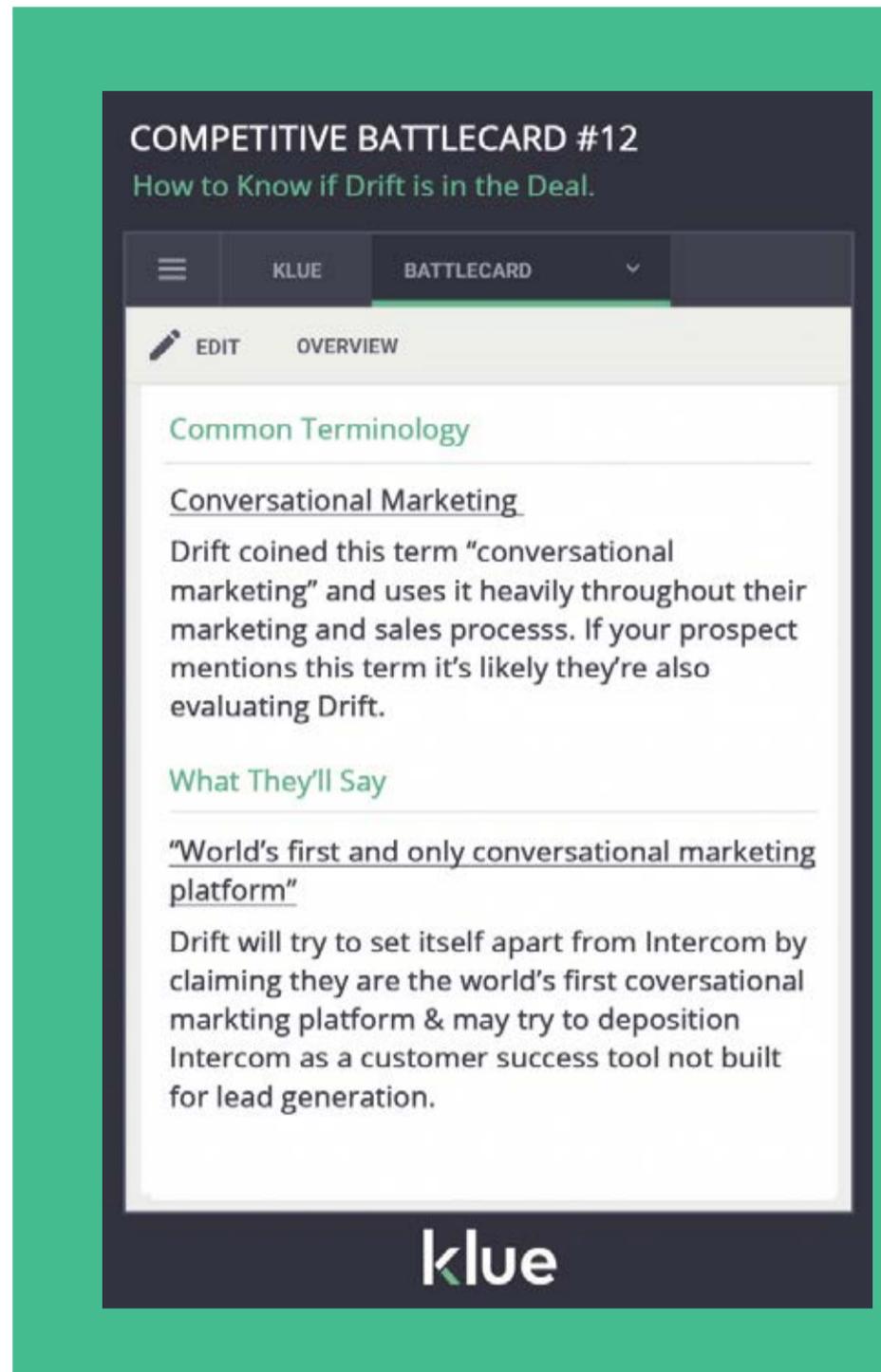
### Example:

Company: Drift – Conversational marketing.

Terminology: Drift coined the term “conversational marketing” and has built an entire brand and solution behind the idea that using a chat tool on marketing websites is a new channel to reach and communicate with potential customers.

Though they have many competitors in their space including companies such as Intercom and Comm100, these competitors don’t use the term widely across their marketing materials, likely because Drift has attached itself so firmly to that term.

If you were a sales rep for Intercom or Comm100 and your prospect was using the term “conversational marketing” when discussing your solution, it would be a very obvious indicator that they were also evaluating Drift.



## Word of Caution

This battlecard cannot 100% guarantee that a competitor is in the deal, as certain terminology and lingo is recycled across an industry. Instead, (with some critical thinking it can help your sales team narrow down which competitors are involved. Early competitor identification will increase your chances of de-positioning any competitor.

# HOW TO SPOT A COMPETITOR

Continued

## Section 2: What They'll Say About You

To build this section of your battlecard you will need to go directly to Sales.

They will tell you how competitors are talking about your products.

Their prospects are coming into calls with preconceived beliefs about what your solution does and doesn't do.

You'll want to identify clues for your sales rep to be on the lookout for. Look for common phrases a prospect will say that gives clues they are viewing your product from the lens of a competitor.

Do they make remarks about where your solution falls short? Do they focus on certain areas of weakness that you know one competitor will usually use to de-position you in a deal?

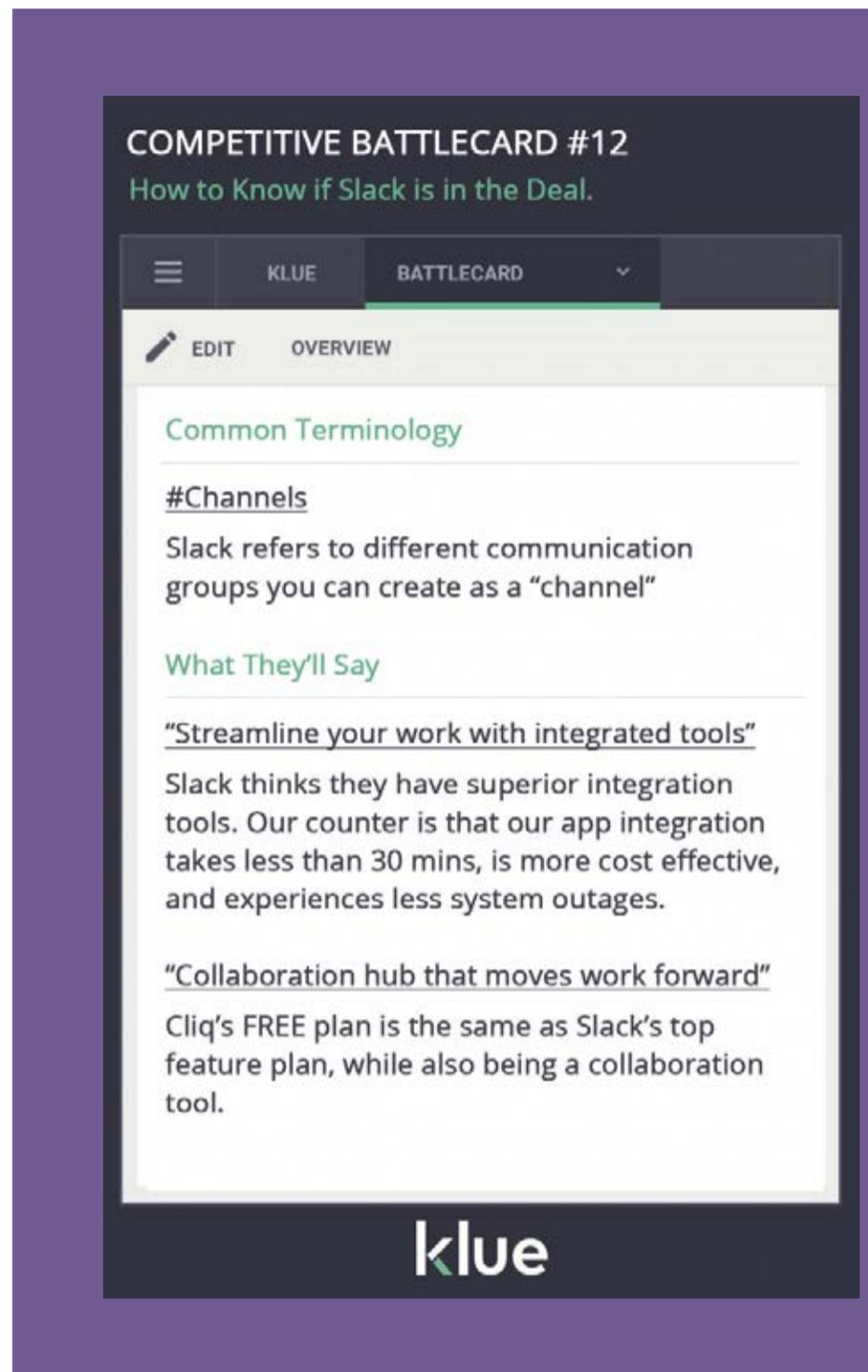
As before, these aren't facts but breadcrumbs of information that might indicate they've already started evaluating a competitor's product.

### Example:

Competitor: Slack

What They'll Say: Streamlines your work with integrated tools.

If you were a sales rep for one of Slack's competitors and were to hear your prospect focusing heavily on integrations as a key feature for their solution set, you would have a very strong inclination that Slack is in the deal because they leverage their broad library of integrations as a key differentiator in their market.



“Set your sales reps up with strategies & tools to identify which competitors are in a deal as early as possible in the sales cycle.”



Looking for more tools  
to help build up your  
**BATTLECARD ARSENAL?**

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