THE CUMBERBATCH GROUP

Competitor Analysis Worksheet

A structured framework for comparing competitors, alternatives, customer value, pricing, positioning, and opportunities for differentiation

Business or project	
Analysis lead	
Date prepared	
Market or geography	
Version	

How to use this worksheet

Compare credible direct and indirect alternatives using current evidence. Evaluate the experience from the customer's perspective, distinguish fact from interpretation, and avoid assuming that every competitor serves the same segment or competes on the same basis. Conclude with choices about positioning, capability, and execution.

01 ANALYSIS SCOPE

Define the business decision, market boundary, customer segment, period, and competitor types included in the analysis.

Decision this analysis must support

Boundary	Definition
Customer segment	
Geography	
Product or service category	
Price range	
Channel	
Time period	

Criteria for including or excluding an alternative

02 COMPETITOR AND ALTERNATIVE INVENTORY

Identify direct competitors, indirect solutions, internal workarounds, substitutes, delay, and the choice to do nothing.

Competitor or alternative	Type	Customer served	Location or reach	Evidence source
	Direct			
	Direct			
	Indirect			
	Substitute			
	Workaround			
Do nothing or delay	Alternative			

Three alternatives requiring the most detailed analysis

Important alternatives that are difficult to observe

03 COMPETITOR PROFILES

Record each competitor's ownership, market focus, maturity, scale, channels, reputation, and apparent strategy.

Profile element	Competitor 1	Competitor 2	Competitor 3
Name			
Ownership and stage			
Primary market			
Target customer			
Main offer			
Delivery channels			
Geographic reach			
Reputation or traction			
Apparent strategy			

Important evidence sources and limitations

04 CUSTOMER AND SEGMENT COMPARISON

Assess which customers each competitor prioritizes and how well the offer matches their needs, behaviors, budgets, and purchasing process.

Customer factor	Our business	Competitor 1	Competitor 2	Competitor 3
Primary segment				
Core need				
Purchase trigger				
Decision maker				
Ability to pay				
Retention driver				

Segments that appear underserved

Segments the business should not pursue

05 OFFER AND FEATURE COMPARISON

Compare the complete customer outcome, not merely the visible list of product or service features.

Offer element	Our business	Competitor 1	Competitor 2	Competitor 3
Core offer				
Primary benefit				
Included components				
Customization				
Quality standard				
Service or support				
Guarantee or assurance				

Offer elements customers value most

Features that add complexity without meaningful value

06 PRICING AND COMMERCIAL MODEL

Examine price, packaging, payment structure, discounts, contract terms, switching costs, and the value customers receive.

Commercial factor	Our business	Competitor 1	Competitor 2	Competitor 3
Entry price				
Typical price				
Pricing basis				
Packages or tiers				
Discounts				
Contract or payment terms				
Switching cost				

How competitors justify their pricing

Pricing opportunity or risk for our business

07 POSITIONING AND MESSAGING

Evaluate what each competitor claims, the audience addressed, the proof offered, and the market perception created.

Positioning factor	Our business	Competitor 1	Competitor 2	Competitor 3
Primary promise				
Audience addressed				
Key messages				
Tone and personality				
Evidence or proof				
Perceived position				

Messages that appear crowded or undifferentiated

Credible position available to our business

08 MARKETING AND VISIBILITY

Compare the channels, content, partnerships, promotions, reputation signals, and apparent customer-acquisition approach.

Marketing factor	Our business	Competitor 1	Competitor 2	Competitor 3
Website and search				
Social media				
Email or content				
Advertising				
Partnerships				
Reviews and reputation				
Promotions or events				

Channels where competitors are strongest

Visibility opportunities competitors are neglecting

09 SALES AND CUSTOMER EXPERIENCE

Review the experience from discovery and evaluation through purchase, onboarding, delivery, support, retention, and referral.

Journey stage	Our business	Competitor 1	Competitor 2	Competitor 3
Discovery				
Evaluation				
Purchase				
Onboarding				
Delivery or usage				
Support				
Retention or referral				

Strongest competitor experience

Friction or service gaps customers encounter

10 CAPABILITIES AND OPERATING MODEL

Compare the capabilities, assets, partnerships, systems, scale, and delivery choices that support competitor performance.

Capability	Our business	Competitor 1	Competitor 2	Competitor 3
Leadership and talent				
Delivery capacity				
Technology and data				
Suppliers and partners				
Brand and reputation				
Financial resources				
Scale or reach				

Capability competitors can defend most effectively

Capability our business must build or access

11 STRENGTHS, WEAKNESSES, AND VULNERABILITY

Summarize evidence-based advantages and limitations, then identify where each competitor is most exposed.

Business	Strengths	Weaknesses	Vulnerability	Confidence
Our business				
Competitor 1				
Competitor 2				
Competitor 3				

Competitor advantage most difficult to replicate

Weakness customers care about most

Assumptions requiring further evidence

12 WEIGHTED COMPARISON

Score each alternative using the same customer-relevant criteria. Weight importance before assigning performance scores.

Criterion	Weight	Our score	Comp. 1	Comp. 2	Comp. 3
Customer fit					
Value delivered					
Price and economics					
Experience					
Credibility					
Accessibility					
Scalability					
Weighted total	100%				

Scoring scale, source, and interpretation

Most important conclusion from the weighted comparison

13 GAPS AND DIFFERENTIATION OPPORTUNITIES

Identify opportunities that matter to customers and that the business can credibly deliver and defend.

Market gap	Customer evidence	Value	Feasibility	Defensibility

Recommended point of difference

Proof required to make the differentiation credible

What the business should deliberately avoid competing on

14 STRATEGIC RESPONSE AND NEXT ACTIONS

Convert the analysis into explicit positioning, capability, pricing, customer-experience, and execution choices.

Decision area	Finding	Strategic response	Owner	Due date
Target customer				
Offer				
Positioning				
Pricing				
Customer experience				
Capability				

Competitor action or market change that should trigger review

Next action	Owner	Due date	Completion evidence