Certify Intel - Data Schema Documentation

Version: 1.0 | **Last Updated:** January 17, 2026

Overview

This document defines the 32 data columns used in the Certify Intel competitive intelligence dashboard. Each column is categorized, typed, and documented with expected sources and validation rules.

Column Categories

Category	Columns	Color Code
Core	1-7	Blue (#2F5496)
Pricing	8-10	Green (#548235)
Product	11-14	Purple (#7030A0)
Market	15-21	Orange (#C65911)
Company	22-28	Navy (#305496)
Digital	29-32	Gold (#BF8F00)

Column Definitions

Core Data (Columns 1-7)

#	Column Name	Data Type	Required	Description
1	Competitor Name	Text	Yes	Official company name
2	Website	URL	Yes	Primary company website (full URL)
3	Status	Dropdown	Yes	Active, Inactive, Acquired, Watch
4	Threat Level	Dropdown	Yes	High, Medium, Low, Watch
5	Last Updated	Date	Auto	Date of last data update (YYYY-MM-DD)
6	Notes	Text	No	Free-form notes and observations
7	Data Quality Score	Number	No	1-100 confidence score on data accuracy

Status Values:

- **Active:** Currently operating and selling
- **Inactive:** No longer operating
- **Acquired:** Purchased by another company
- **Watch:** New entrant or emerging competitor

Threat Level Values:

- **High:** Direct competitor, similar target market
- **Medium:** Adjacent competitor or partial overlap
- **Low:** Tangential or non-competing
- **Watch:** Monitor for potential threat changes

Pricing Data (Columns 8-10)

#	Column Name	Data Type	Required	Description
8	Pricing Model	Dropdown	Yes	How the competitor charges
9	Base Price	Currency	Preferred	Starting price or typical cost
10	Price Unit	Text	Preferred	Unit of pricing (per user, per month, etc.)

Pricing Model Values:

- Per User
- Per Provider
- Per Location
- Per Visit
- Flat Rate
- Tiered

- Custom
- Unknown

Product Data (Columns 11-14)

#	Column Name	Data Type	Required	Description
11	Product Categories	Text	Yes	Semicolon-separated list of products (e.g., Intake; Payments; Scheduling)
12	Key Features	Text	Yes	Main capabilities and features
13	Integration Partners	Text	Preferred	EHR/PM systems they integrate with
14	Certifications	Text	Preferred	Security and compliance certifications (e.g., HIPAA; SOC2; HITRUST)

Standard Product Categories:

- Patient Intake
- Insurance Verification
- Payments
- Scheduling
- Patient Portal
- Telehealth
- RCM (Revenue Cycle Management)
- PM (Practice Management)
- EHR (Electronic Health Record)

Market Data (Columns 15-21)

#	Column Name	Data Type	Required	Description
15	Target Segments	Text	Yes	Customer segments they target (e.g., Health Systems; Specialty Practices)
16	Customer Size Focus	Dropdown	Yes	Practice size they target
17	Geographic Focus	Text	Preferred	Geographic markets (e.g., US National, CA only)
18	Customer Count	Text	Preferred	Estimated number of customers
19	Customer Acquisition Rate	Text	Preferred	How fast they're adding customers
20	Key Customers	Text	No	Notable customer names or references
21	G2 Rating	Number	Preferred	G2 Crowd rating (1.0-5.0)

Customer Size Focus Values:

- Solo
- Small (1-15)
- Medium (15-50)
- Large (50+)
- Enterprise
- All Sizes

Company Data (Columns 22-28)

#	Column Name	Data Type	Required	Description
22	Employee Count	Text	Preferred	Current headcount (e.g., 500+)
23	Employee Growth Rate	Text	No	Year-over-year growth (e.g., 20% YoY)
24	Year Founded	Number	Preferred	Year company was founded
25	Headquarters	Text	Preferred	City, State of HQ
26	Funding Total	Text	Preferred	Total funding raised (e.g., $50M+)
27	Latest Round	Text	No	Most recent funding round
28	PE/VC Backers	Text	No	Key investors or ownership

Digital Presence Data (Columns 29-32)

#	Column Name	Data Type	Required	Description
29	Website Traffic (Monthly)	Text	Preferred	Estimated monthly visits (e.g., 100K+)
30	Social Following	Text	No	Total social media following
31	Recent Product Launches	Text	No	Recent feature or product announcements
32	News Mentions (30d)	Number	No	Count of news mentions in last 30 days

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Data Sources

Data Category	Primary Sources
Core	Company website, LinkedIn
Pricing	Pricing pages, sales calls, G2/Capterra
Product	Product pages, feature lists, documentation
Market	Case studies, press releases, LinkedIn
Company	LinkedIn, Crunchbase, press releases
Digital	SimilarWeb, social profiles, Google News

Validation Rules

Required Fields

All competitors must have:

- Competitor Name
- Website
- Status
- Threat Level
- Product Categories
- Target Segments
- Customer Size Focus

Format Standards

- URLs: Full URL with https://
- Dates: YYYY-MM-DD format
- Prices: Include currency symbol (e.g., $199)
- Lists: Semicolon-separated (e.g., Intake; Payments; Scheduling)
- Percentages: Include % symbol (e.g., 20% YoY)
- Counts: Use + for estimates (e.g., 1000+)

Data Quality Scoring

Score	Meaning
90-100	Verified from primary sources
70-89	Good data with some estimates
50-69	Partial data, needs validation
Below 50	Significant data gaps

Change Tracking

All changes to competitor data should be logged in the Change Log sheet with:

- Date of change
- Competitor affected
- Type of change (Pricing, Feature, Funding, etc.)
- Previous value
- New value
- Source of update
- Severity (High, Medium, Low)