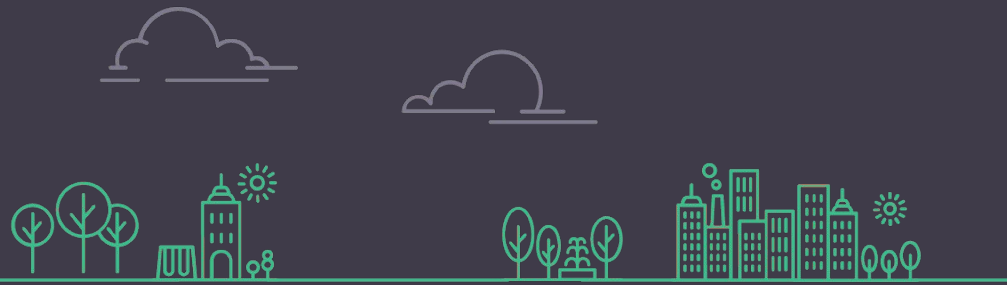
Battlecards

Tips, Templates & Examples



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An effective battlecard is a **systematic way to help reps do what top sales reps do intuitively**.

It's about tight, digestible, key talking points that link through to more detail. Reps win more deals by understanding how competitors shape and influence the customer's problem then proactively deposition without being negative.

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A good battlecard

1. States your competitor's points and supporting facts.
2. States counterpoints and supporting facts.
3. Uses a tone that is conversational; something reps can use or riff off of directly

More thoughts on what makes a good battlecard here, here and here.

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Content to consider:

1. **Top Three:** things to know before pitching against them; set tone for rep (i.e. Acme is complex and requires a big upfront investment)
2. **Positioning**: how they pitch themselves and what they'll say to the prospect (i.e. Acme is the most complete HR recruiting platform in the world)
3. **Approach to Market**: key clients, vertical strength, key partners (i.e. 200+ enterprise customers including 80 of F100)
4. **Why we win**: their key weaknesses
5. **Why we lose**: their key strengths
6. **Objection handling**: what they say when selling against us; counterpoints to each of those objections

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Content to consider:

7. **Landmines to Use**: what to say when selling against them (i.e. they are closed platform with limited services and SMB focus)
8. **Pricing:** Per product line ideally with a link to evidence (on competitor's site or a news article or quotes/notes from other reps)
9. **Watch out for:** what they'll do to win against us (i.e. heavy discounting for big brands, cheap upfront contracts made up following years)
10. **Default point of view of the buyer:** what mindset will the salesperson expect to encounter
11. **SDFC data:** "Recent wins against this competitor and by whom", "Company win rate over time against this competitor”

Many more examples here

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A couple of other points:

- Avoid the temptation to give instructions; instead detail the competitors claims and give responses that refute/deposition
- Two battle cards are better than one: one for the decision maker and one when pitching the technical user
- Usability matters: enable quick text scanning and drill down
- Findability: make them SUPER easy to find (ideally in multiple places: mobile app, inside SFDC, via email/get battlecard, slack)
- Collaborate with reps continuously to refine content; fresh and trusted content avoids the "wiki or old ppt death spiral"

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Templates and Examples

Zendesk, Bamboo and Vend are fake examples created from public content

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EXAMPLE BATTLECARD - VEND

Overview

VIEW IN PROFILE

Vend Overview:

Vend offers POS and e-commerce solutions. The product line is fairly simple. The focus has been on increasing the features to support effective retail (inventory management, reporting).

Target Customers:

Vend groups its POS offerings and pricing scenarios by the number of store locations. They are winning with smaller companies with less complicated product lines.

When it comes to larger more complicated companies/product lines and multiple outlets the product tends to fail miserably. Reviews confirm that smaller companies make up the customer base. Reviews get increasingly negative as the company size increases.

G2Crowd - *Breakdown of respondents*

Comparison

VIEW IN PROFILE

Category	Comp X	Vend HQ
Fully integrated POS	Complete end to end	Limited, pieced together
Inventory Management	Real time updates	Delays
Reporting & Analysis	Advanced Reporting	Basic Reporting
E-commerce	Newly Entering E-commerce	Already in E-commerce, but weak solution set.

Comp X offers end to end retail management solutions. From customer facing to store management and POS. Comp X is standalone and far superior as a result of the fully integrated capabilities.

Vend offers a variety of integrations and make shift connections. It's clear that Vends product team is clearly a victim of "make the sale" or "stop the churn" based on the level of depth offered for

Strengths

VIEW IN PROFILE

Cost is low

- Tool built for simple retail situations
- Costs are USD, no accomadation for Canadian companies.

Tool is good for small companies

- Difficulty in expansion or growth. New stores change in inventories are cumbersome and not easily updated.

Weaknesses

VIEW IN PROFILE

Customer Tracking

- Tracking discounts has been a regular issue for Vend and seems to be included in multiple reviews.
- Issues with Customer groups.

Reports & Print outs

- Printing and return is a confusing process.
- Export, reporting and data are common themes again throughout the negatives of reviews.

E-commerce

- The Shopify integration has proved difficult and many customers do not find it simple or a great experience.
- Refer to Useful Quotes for specific examples.

Functionality

- There is a clear need for more functionality. Common sentiment seems to refer to Vend not being a fit for there company based on the complexity of the business and

Useful Quotes

VIEW IN PROFILE

April 2017

Terrible support that is not fit for purpose

April 2017

It lacks things like being able to change product cost at the register and the inventory reporting falls short

Jul 2016

We use Vend along with Shopify and it can be very tricky to tell which program is changed. Vend can change and allow for things to transfer to Shopify, but it is not possible to change things in Shopify and let it carry over to Vend. This has been difficult to counter in the past, but if we only change the details in Vend, then Shopify will be changed as well

Nov 2015

1. Takes a while to learn and master (for employees)
2. The receipt printing and return process can be confusing

Landmines

VIEW IN PROFILE

Is it important for you to know who your repeat customers are?

Are you set up with an e-commerce platform? Are you planning to move your stores online?

How important is reporting to your business? do you need basic data or more advanced?

Fears, Uncertainty, Doubts

VIEW IN PROFILE

Point to their ROI calculator

No matter what the input there is positive outcomes. It doesn't sound like they have a clear grasp on ROI.

Highlight Comp X case studies which show where real returns are generated from POS.

- Repairall Case Study
- Carrier Case Study

Lean on user reviews and highlight the size of the companies responding

Over 50% of reviews on G2crowd.com were from companies with less than 50 employees.

From the mid to large companies, the tend to highlight that Vend is a temporary POS system...It's a system that is used while a company transitions from a small retailer to a mid to large. They tend to switch out for a better system when they transition. Why wait and suffer through the pains?

Latest Wins

VIEW IN PROFILE

Date: July 2017

Sales Rep: Charles Montgomery Burns

Value: $114,000 per year

Opportunity Name: Mo's Mobile

Reasons for Winning: Mo's chose comp X because it was designed for enterprise companies. Other systems like Vend created poor experiences for customers and failed to track inventory effectively. Comp X reputation played a huge roll in the win. Useful Quote from CEO of Mo's Mobile on why he looked for a new system: "We were so frustrated. We had spent literally years working on our POS system. We were in a constant battle with it and staff hated it. Ultimately we realised we were poorly serving our customers, letting down our staff and bleeding commissions and stock. It had to change."

Date: May 2017

Sales Rep: Barnar Gumble

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EXAMPLE BATTLECARD - BAMBOOHR

Buyer Persona

VIEW IN PROFILE

Questions to identify pains:

1. What takes up the most time in your day?
2. What is the biggest inhibitor to company growth?
3. What would you consider a successful implementation?

Small Business Owner (0-10 emp):

Landmines to Lay

VIEW IN PROFILE

Is it important to have a hands on onboarding experience?

- BambooHR is hands-off with onboarding. This could end up taking a lot of internal resources.

How important is is to have new features? Do you expect to be charged a premium?

- BambooHR offers a wide breadth of services, they don't do any of them particularly well, often charging premium prices to access a better version.

Do you use many different types of software for HR? How important are integrations?

- Last year we introduced 7 integrations to BambooHR's 2. They aren't moving towards integration at equal velocity.

Top 5 Reasons We Win

VIEW IN PROFILE

1. Freemium model a better entry-point for growing businesses.
2. Time & scheduling a must-have feature & ours out-perform BambooHR.
3. Better services & support.
4. Best benefits management on the market at no cost to clients.
5. Scalable Solution - Services & feature-depth expand with your company.

- **Freemium model** - We offer the HR basics for free, allowing users to scale up the cost & services as their business grows.
- **Reporting is nice, but the day-to-day is a must have** - Time & scheduling features out-perform BambooHR, and they are

Top 5 Reasons We Lose

VIEW IN PROFILE

1. User requires broader feature offering
2. Prospect already using multiple software tools and needs to integrate
3. Receives slightly better online customer reviews
4. Negative perception of Zenefits from recent legal issues.
5. Will import all of clients existing data during onboarding

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- **User requires broader feature offering** - Best entry-point is small business. If they are mid-market, BambooHR may provide a broader set of feature they want to use.
- **Prospect already using multiple software tools and needs to integrate** - we aren't a fit as we don't offer open API.
- Reviews of BambooHR are better than Zenefits - G2Crowd

Pricing

VIEW IN PROFILE

$6-8/employee/month

- You pay a monthly subscription fee for each user login based on the number of employees at your company.
- Additional fees apply for optional training.
- Additional fees to use Performance Management Tool

Objections / Reframes

VIEW IN PROFILE

You don't offer the breadth of features that BambooHR does

- We offer 90% of what BambooHR does, for free. The other 10% is not core HR, it's "nice to have". Save that money to invest in your business.

BambooHR gets better overall ratings than Zenefits.

- BambooHR rates better for features built for large organizations. For SMEs without these robust needs, we outperform on the basics. (eg. Our Workforce management is rated better)

I'm already using multiple software tools. BambooHR offers open API to integrate and Zenefits doesn't.

- In one year we went from a benefits tool to full core HR w/ 7 integrations, while Bamboo only launched two features. At current velocity, our feature dev rate is far outpacing BambooHR.

BambooHR will import all of clients existing data

Key Strengths

VIEW IN PROFILE

1. Pricing: Affordable subscription-based pricing
2. Ease of use: Easily navigated user interface makes learning BambooHR easy.
3. Open API: Open API allows for simple integration of third-party applications
4. Broad range of features/services: Covers a wide range of HR solutions.

Key Weaknesses

VIEW IN PROFILE

1. Users struggle to onboard to the platform. Little direction is given and customer support can be slow to respond.
2. Feature functionality is weak: Reportedly, features can be glitchy, esp. on mobile.
3. Weak Integrations:
   Aside from integration with 15Five, few integrations currently exist to bring together data across the multiple tools most HR teams are using.

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EXAMPLE BATTLECARD - ZENDESK

Overview

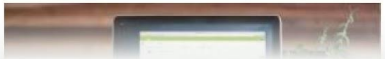
VIEW IN PROFILE

zendesk

Founded: *2007*
Headquarters: *San Francisco*
Total funding: *$220M*
Latest funding: *Series B, $150M (Sept 2014)*
Valuation: *Private*
Website: ***zendesk.com***

Solution Overview

Zendesk builds software for better customer relationships. It empowers organizations to improve customer engagement and better understand their customers.



Zendesk vs Salesforce

VIEW IN PROFILE

FIGURE 4 Forrester Wave™: Customer Service Solutions For Midsize Teams, Q4 '15

	Forrester's Weighting	Adobe Solutions	Freshdesk	Microsoft	Moxie	Oracle Service Cloud	Parature	Salesforce	SAP Cloud For Service	Sugar CRM	Zendesk
CURRENT OFFERING	50%	2.74	2.16	2.93	3.42	4.36	2.44	3.76	2.06	2.33	2.95
Case Management	26%	2.84	1.62	4.84	2.84	3.70	1.16	3.70	2.30	3.00	2.40
Omnichannel capabilities	26%	3.48	1.54	1.85	4.36	4.70	2.93	3.71	1.70	1.38	2.95
Knowledge and content	26%	2.58	2.94	1.00	3.20	4.96	3.09	3.95	1.18	2.04	2.94
Business intelligence	7%	1.00	2.80	2.60	4.20	4.60	2.60	2.80	3.40	2.40	4.60
Architecture and platform	10%	2.55	3.80	5.00	3.20	3.65	2.95	3.65	4.28	4.45	4.18
Deployment size	5%	2.00	0.00	5.00	2.00	4.00	2.00	5.00	1.00	1.00	1.00
STRATEGY	50%	1.93	2.40	4.62	3.02	3.70	2.60	4.61	3.24	2.50	3.99
Product strategy	33%	1.00	1.00	5.00	3.00	3.00	1.00	5.00	3.00	1.00	5.00
Execution road map	25%	3.00	3.00	4.00	4.00	4.00	3.00	5.00	3.00	3.00	4.00
Go-to-market approach	7%	2.15	2.55	5.00	1.85	4.40	3.55	4.70	4.70	3.40	3.40
Supporting services	10%	3.00	1.50	4.50	3.00	4.50	4.00	4.50	4.50	3.50	3.00
Third-party ecosystem	5%	0.70	1.50	5.00	1.70	3.90	3.80	5.00	4.00	3.00	2.80
Commercial model	20%	1.80	4.60	4.60	2.60	3.80	3.40	3.40	2.60	3.40	3.80
MARKET PRESENCE	0%	1.00	2.60	4.60	2.00	2.80	2.60	4.60	2.00	2.60	4.40
Number of live installations	80%	1.00	3.00	5.00	2.00	3.00	3.00	5.00	2.00	3.00	5.00
Number of users (customer service agents)	20%	1.00	1.00	3.00	2.00	2.00	1.00	3.00	2.00	1.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Key Weaknesses

VIEW IN PROFILE

1. **Not suited for larger teams:** Although it has begun to move upmarket, Zendesk remains best suited for small and midsize customer service teams (between 10 and 300 agents). Larger teams have reported challenges with cross-departmental collaboration.
2. **Case management:** Immature case management system. Weak notification system can lead to longer resolution and response times.
3. **Search functionality is weak:** Reportedly, it's very hard to look back on historical content and find specific items/tickets.
4. **Limitations on "Essential" and "Team" packages create challenges:** You can only have 1000 open tickets at one time before Zendesk auto closes them for you (even without a trigger/automation to close)

Key Strengths

VIEW IN PROFILE

1. **Ease of use:** Its simplicity, usability, and application ownership has garnered it over 60,000 paid customers since its inception in 2007.
2. **Implementation:** The SaaS solution typically requires no implementation: small teams can configure the software themselves.
3. **Integrations:** Freshdesk and Zendesk offer integrated phone, live chat, and email support, social media integration, and self-service center. You can integrate your Facebook and Twitter pages with the apps and offer customer support right inside your customers' favorite social websites.
4. **Benchmarking:** Zendesk's benchmarking service allows users to compare their key performance indicators (KPIs) to their peers

Pricing

VIEW IN PROFILE

- Essential: $9/user/month
- Team: $25/user/month
- Professional: $59/user/month
- Enterprise: $125/user/month

Full package details

Pain Points by Persona

VIEW IN PROFILE

Developers & Support Staff

- Can't Manage Risk and Compliance
- Low Agility – Can't Quickly Course Correct or Adapt Quickly to Change
- Can't Provide Timely Planning, Analytics and Operations Support to CEO's Strategy

CTO & Admins

- Can't provide Business Insight to Stakeholders/LOBs/Company
- Inaccurate, Untimely, Inconsistent Data, Forecasts, Plans, Models, Analytics, Dashboards and Reports
- Poor Data, KPIs and Business Insights

Landmines to lay

VIEW IN PROFILE

1. Stability: Are you ok with periodic network outages?

Why it works? Stability is a "must have" for everyone. Zendesk has a surprising amount of outages compared to top-tier enterprise services like Salesforce, AWS, or Atlassian.

2. Data quality: What compromises does your company make because of the lack of access to the right Data, and KPIs?

Why it works? Zendesk data quality is sporadic. Their pre-built reports are decent, but data becomes inconsistent when building customized reports. Without high quality data, it becomes difficult for companies to track their progress and success metrics.

3. Ease of collaboration across departments: How do you enable collaboration among multiple IT teams and your line of business peers? How does Ease-of-Use prevent you from engaging more participants?

Why it works? For larger, cross-departmental teams, collaboration is key. Zendesk struggles with large Enterprises due to restrictions and lack of visibility across departments.

Objection Handling

VIEW IN PROFILE

Objections vs Zendesk

This deck was prepared to help sales overcome objections planted by competitors.

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TEMPLATE - OVERVIEW

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

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

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.

Questions to Ask

VIEW IN PROFILE

Highlight areas of weakness, recent news

Example: Aren't they more focused on pharma?

Competitor X is more focused on Enterprise Tech companies. Is there product designed with your use case in mind?

Example: How important is it for your information to be secure?

Competitor X has had 2 data breaches in the past year.

Track Record

VIEW IN PROFILE

55% company wide win rate against ...

Recent wins against them

- Client name and which salesperson
- **Switch wins** - client name, salesperson

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 client's (almost) every need.*

Key Weakness

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

Positioning

VIEW IN PROFILE

- How they pitch themselves (i.e. the most complete social software platform in the world)
- What they'll say about themselves when pitching

When to Engage/Not to Engage

VIEW IN PROFILE

Go/no areas where you will win or lose

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

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TEMPLATE - SALES CYCLE

Positioning

VIEW IN PROFILE

- How they pitch themselves (i.e. the most complete social software platform in the world)
- What they'll say about themselves when pitching

Why we win

VIEW IN PROFILE

Their key weaknesses

Support with recent win stories against the competitor.

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

- Client Name - Switch win - Client estimated that the same tasks took him 50% less time then with the competitors product.

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Landmines to Use

VIEW IN PROFILE

(How to sell against them)

What to bring up when selling against them (i.e. They're a closed platform more reliant on services mostly serving pharma)

Pre-emptive advantages

VIEW IN PROFILE

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

Why we lose

VIEW IN PROFILE

Their key strengths

Include details on how to avoid, common pitfalls.

- Example: Competitor X will try to lead the client to focus on reporting as the critical need. Refocus the conversation to the workflow and error minimization.
  - "Reporting is always better when the data is accurate". The competitors product is known to be bulky and creates a lot of opportunity for errant entry.

Key Points

VIEW IN PROFILE

- Top three things to know before pitching against them to set tone for salesperson going into a pitch
- "X.com is complex and requires heavy initial and on-going investment and FT services person to code campaigns"

Objection Handling

VIEW IN PROFILE

1. **Objection (How they sell against us)**
   - What they say when selling against us
   - Counter point to each of those objections
2. **Objection** - Same as above
3. **Objection** - Same as above
4. **Objection** - Same as above

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TEMPLATE - CLOSING THE DEAL

Positioning

VIEW IN PROFILE

- How they pitch themselves (i.e. the most complete social software platform in the world)
- What they'll say about themselves when pitching

Why we win

VIEW IN PROFILE

Their key weaknesses

Support with recent win stories against the competitor.

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Counter FUD (Fears, Uncertainty, Doubts)

VIEW IN PROFILE

Points to help sales team defend against the Fear/Uncertainty/Doubt that competitors will make about us

- Example: Competitor X will suggest that we do not have experience with enterprise clients based on our current client base. Current enterprise clients include .... and will provide references.

Watch out for

VIEW IN PROFILE

i.e. heavy discounting for big brands, cheap upfront contracts then make it up following year, executive involvement

- Example: Competitor X is known for offering 40% off for the first year. A former client informed us that following year 1 the competitor raised the contract price by double the original non discounted value.

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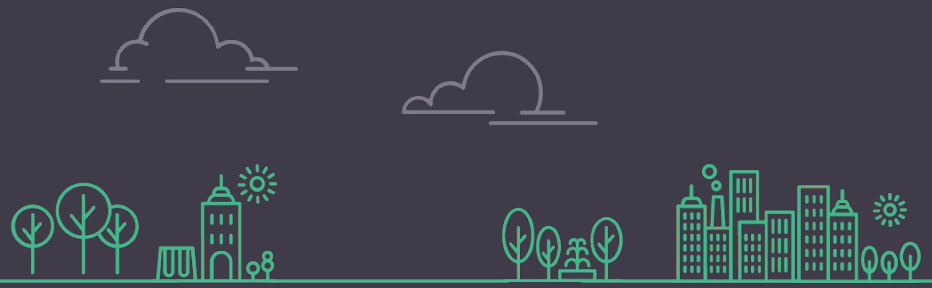
Click here for more resources on battlecards.



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