

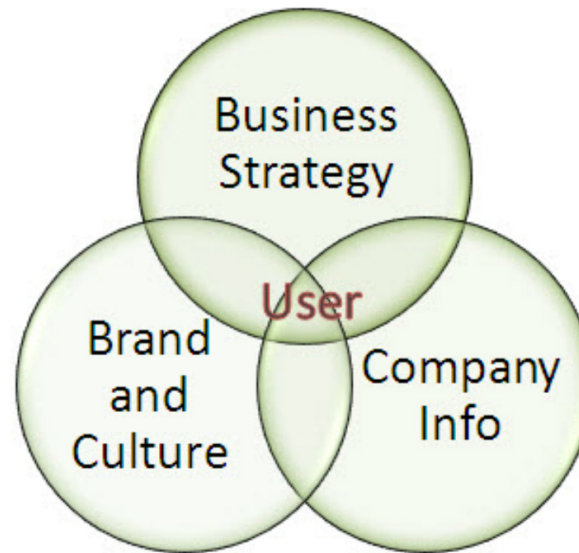


Quick Tips for Creating a Competitive Intelligence SharePoint Site

SLA Annual Conference 2013

Megan Buttita, Allstate

Who?



Involve users in the design process and focus on user efficiency, impact and adoption

A specific audience should be targeted in most instances. Before you launch a new page or update an existing page, make sure you are targeting the right audience.

What?



A SharePoint "dashboard" or site allows users a one-stop shop for consuming and adding information to your CI initiatives.

When?



If you don't already have a CI site, now is the time!

Set-up a schedule to add/remove content

Where and How?

You might need to go through a discovery process with help from you SharePoint Farm Administrator or someone in the IT department (whoever owns the SharePoint environment) to determine the structure for your site.

You will need administrative level rights in most instances to add/remove/edit sites and web parts.

Why?



Create a competitive intelligence dashboard for a one-stop shop to gather and deliver Competitive Intelligence information.

Create and Design!



A word cloud featuring various terms related to design and development. The words are arranged in a dense, overlapping cluster. The colors of the words range from dark red to orange-brown. The words include: Create, User, Themes, Change, SharePoint, Branding, Interactivity, Layouts, Visualize, CSS, Intranet, Designer, Pages, Style, Organize, Functionality, Planning, Marketing, Collaborate, and Style.

Create **User** **Themes** **Change** **SharePoint** **Branding** **Interactivity** **Layouts** **Visualize** **CSS** **Intranet** **Designer** **Pages** **Style** **Organize** **Functionality** **Planning** **Marketing** **Collaborate**

Announcements



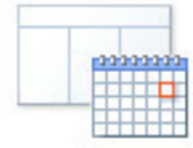
Announcements

Use the Announcements web part to highlight important news and alerts.

Announcements

Date	Title	Type of News
5/30/2013	Restructuring at Major Competitor	Restructures
Please click here for more info.		
Teaser...Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.		
5/28/2013	*BREAKING NEWS* ACME to Layoff Thousands in the US	Layoffs
Please click here for more info.		
Teaser...Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.		
5/24/2013	Massive Influx of New Hires at XYZ	New Hires
Please click here for more info.		
Teaser...Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.		

Calendars



Calendar

Use the Calendar web part to show upcoming events, have users add

Competitor Events

June, 2013						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2	3	4	5	6	7	8
			ACME Marketing Camp			
9	10	11	12	13	14	15
					ACME's 10K Filing	
16	17	18	19	20	21	22
		Competitor XYZ IPO				
23	24	25	26	27	28	29

Custom Lists



Custom List

Use custom lists to track tacit and explicit knowledge that can be exported, sorted, or connected to an Access database for further analysis.

Your Eyes on CI

<input type="checkbox"/> Competitor	Type of Info	Info	URL if Applicable
ABC	Word of Mouth	New office opening down the street	
XYZ	Product News	New product line coming	Product News Channel
ACME	Employee News	100 employees have been hired	Daily Finance Press Release
+ Add new item			

Surveys



Survey

Use surveys to keep your pulse on the competition through employees eyes and ears, or to gather information from new employees that come from competitive companies or industries.

Set permissions so that only certain people can see responses.

Which competitor did you come from?

Question 1

- ☐ Enter Choice #1
- ☐ Enter Choice #2
- ☐ Enter Choice #3

Other info you feel comfortable providing

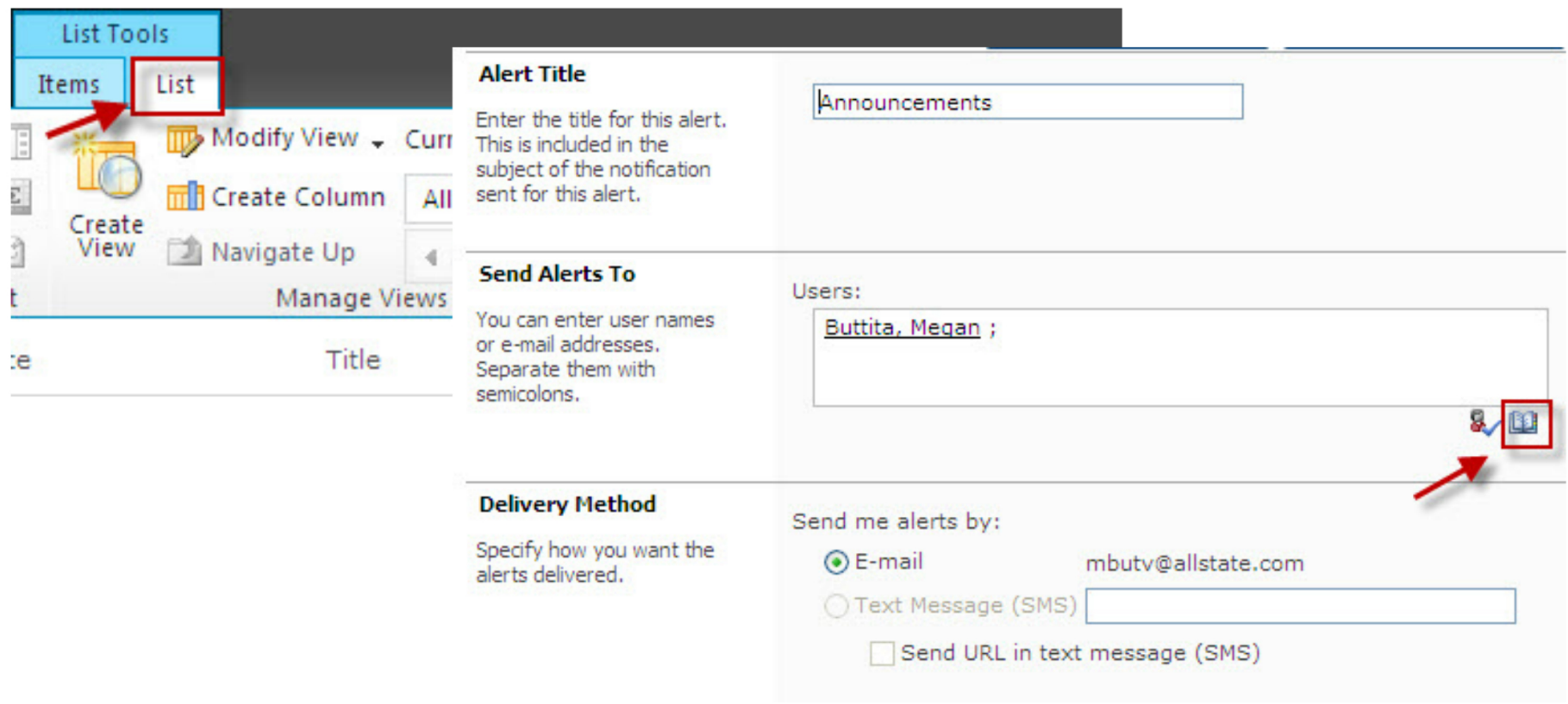
Finish

Cancel

Alerts



Alerts can be customized to push content out to certain groups or people that you can set-up



The screenshot shows the "List Tools" menu with "List" highlighted. The "Alert Title" field contains "Announcements". The "Send Alerts To" field contains "Buttita, Megan ;". The "Delivery Method" section shows "E-mail" selected with the email address "mbutv@allstate.com". A red arrow points to the "List" menu item, and another red arrow points to the "Add" button (a plus icon in a square) in the "Send Alerts To" field.

List Tools

Items **List**

Alert Title

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Send Alerts To

You can enter user names or e-mail addresses. Separate them with semicolons.

Delivery Method

Specify how you want the alerts delivered.

Send me alerts by:

☒ E-mail mbutv@allstate.com

☐ Text Message (SMS)

☐ Send URL in text message (SMS)

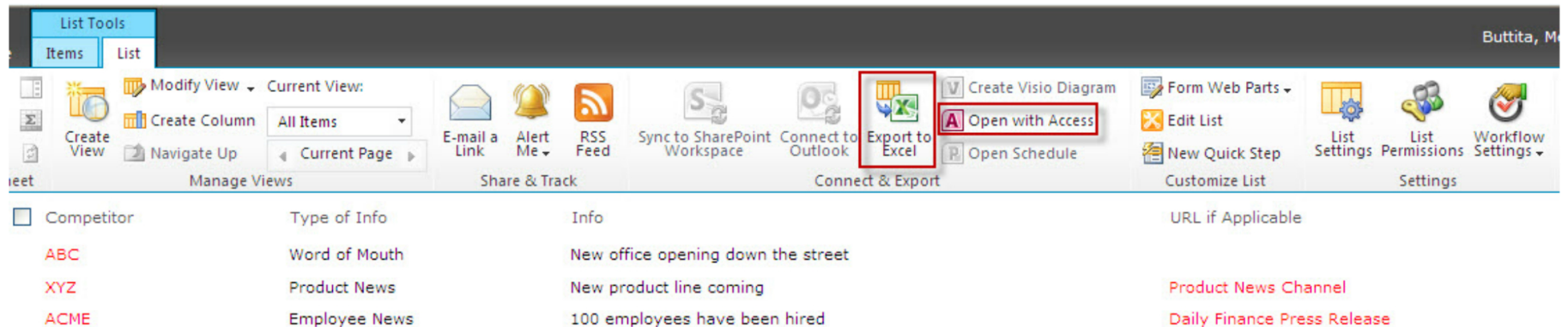
Deliverables

Marketing and branding!

Package as a part of a newsletter

Deliver TIMELY and ACTIONABLE information!

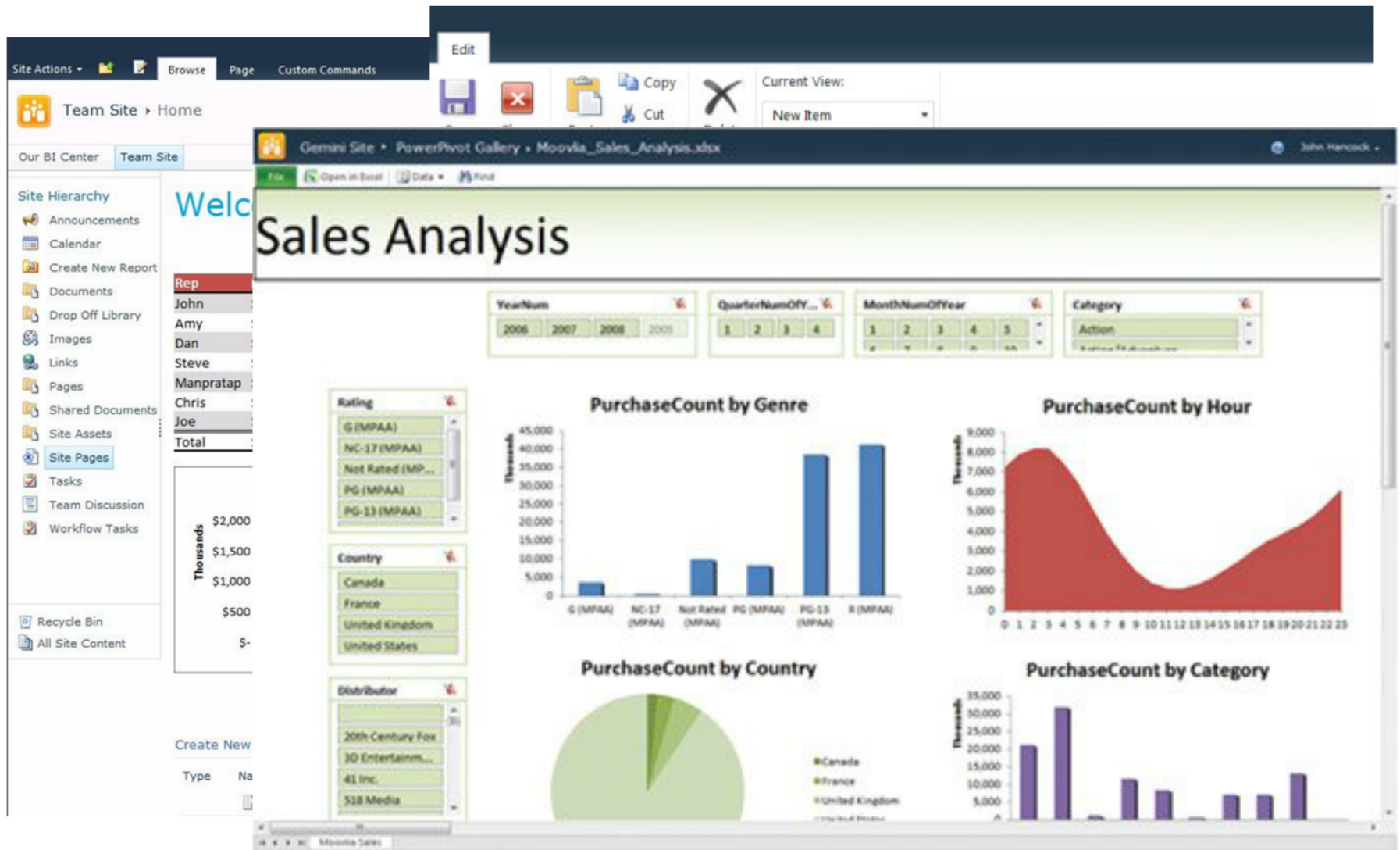
Send customized spreadsheets to stakeholders using aggregated info - create pie charts, pivot tables, "Hot Topics and Relevant News"



The screenshot shows the SharePoint 'List Tools' ribbon with the 'Items' tab selected. The 'Export to Excel' button is highlighted with a red box. Below the ribbon, a table displays data from a list.

Competitor	Type of Info	Info	URL if Applicable
ABC	Word of Mouth	New office opening down the street	
XYZ	Product News	New product line coming	Product News Channel
ACME	Employee News	100 employees have been hired	Daily Finance Press Release

Other Features to Consider



Questions?

