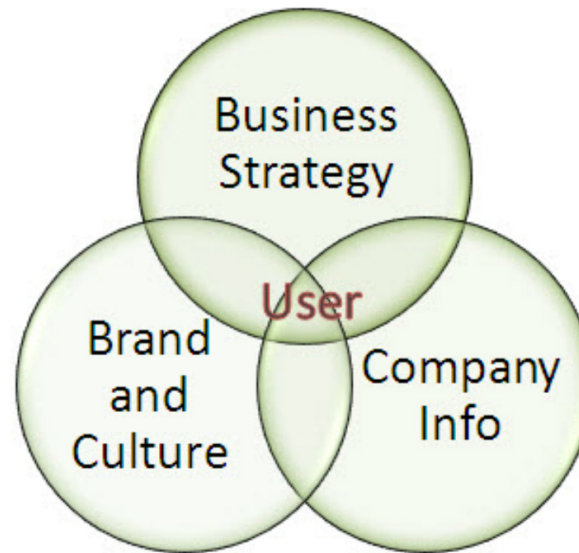# Quick Tips for Creating a Competitive Intelligence SharePoint Site

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!

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, consectetuer 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.

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| 5/24/2013 | Massive Influx of New Hires at XYZ | New Hires |

Please click here for more info.

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Calendars
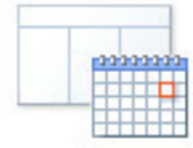
Calendar

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 ACME Marketing Camp	6	7	8
9	10	11	12	13	14 ACME's 10K Filing	15
16	17	18 Competitor XYZ IPO	19	20	21	22
23	24	25	26	27	28	29

Custom Lists

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

Custom List

Your Eyes on CI

	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

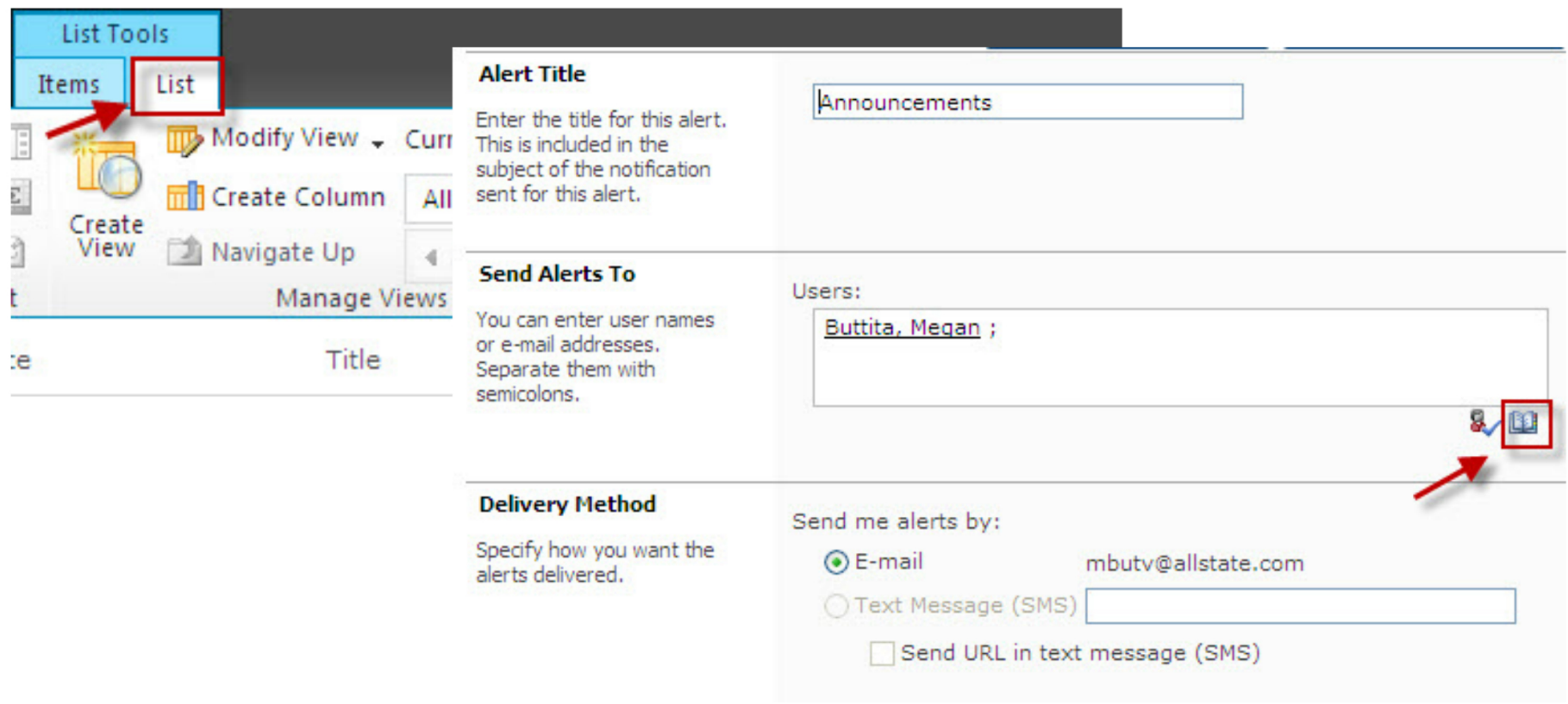**Other info you feel comfortable providing**

[   ]

Finish   Cancel

Alerts

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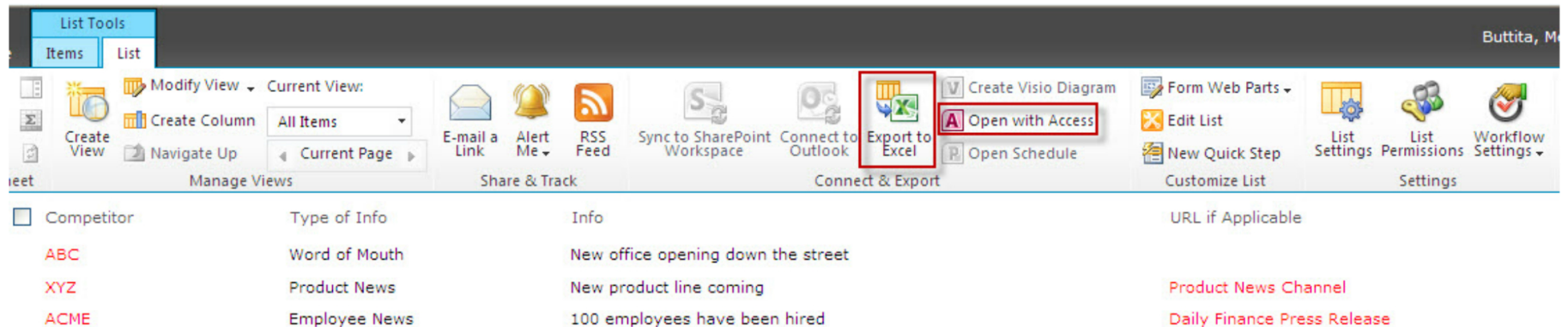
Deliverables

Marketing and branding!

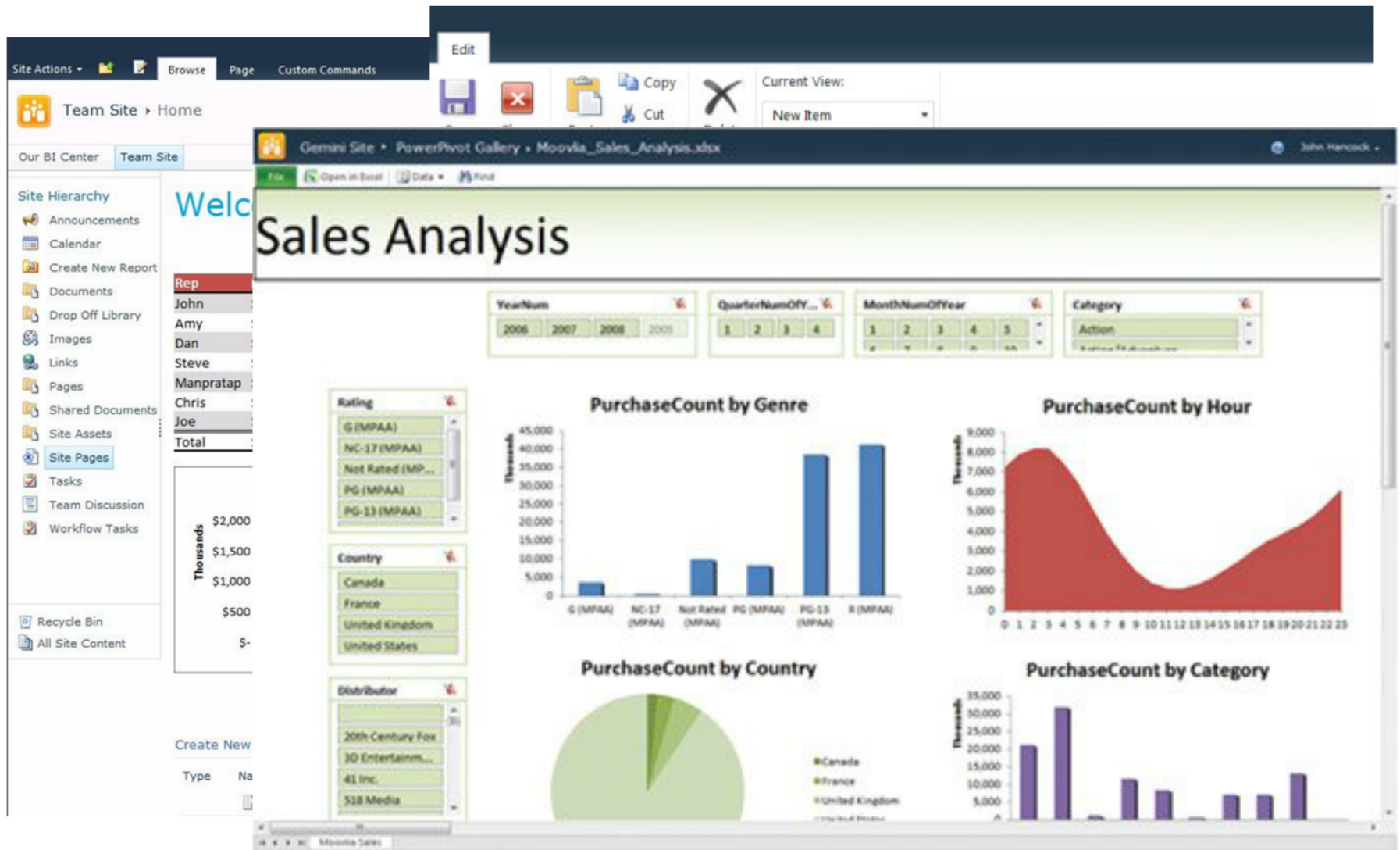Package as a part of a newsletter

Deliver TIMELY and ACTIONABLE information!

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

Other Features to Consider

Questions?