



FREE RESOURCE • COMPETITIVE INTELLIGENCE

The Competitive Intelligence Audit Checklist

A one-sitting audit of the blind spots that tend to surface at the worst moment — in a board meeting, a renewal negotiation or a buyer's procurement review. Six sections: market signals, buyer evidence, direct competitors, adjacent players and substitutes, AI visibility, and the review rhythm that keeps it current. Built on the same four-angle check we run for clients: market, buyers, competitors, trends.

6 SECTIONS

23 CHECKS

ABOUT 30 MINUTES

FOR B2B TEAMS OF 10-250

For the CEO or head of growth who owns the competitive story

THRIVEFINITY.UK

How to use this checklist

Work through the six sections in order — each takes roughly five minutes. Tick a box only when you have genuinely confirmed it, not when you intend to. An unticked box is not a failure: it is exactly what this audit exists to surface before a customer, a board member or a competitor finds it for you.

Best done by the person who will have to defend the answers, with your current sales deck and website open alongside.

01 Market Signals

Is the market real, and is the timing right?

- ☐ **Market size traces to a named, dated source** — not a press release or a figure nobody can locate any more.
- ☐ **Calculated bottom-up at least once** — realistic number of target customers × realistic annual revenue per customer.
- ☐ **Source is recent enough for your category** — in fast-moving markets, a figure that is two years old can mislead.
- ☐ **Timing stated explicitly** — window open, closing or not yet open — and why, in one sentence.
- ☐ **At least one regulatory or market shift identified and dated** — a forcing function, not a vague trend.

COMMON FAILURE

Quoting a top-down analyst figure (“the market is worth £X billion”) with no visible method. Undated, unsourced market claims are usually the first thing a sceptical reader challenges.

02 Buyer Evidence

Who actually buys, and where do they look?

- ☐ **Buyer profile built from real signals** — won and lost deals, search demand, sales conversations — not from assumption alone.
- ☐ **At least one channel-fit signal checked** — search volume, community activity, event attendance or existing paid-channel results.
- ☐ **Willingness to pay checked against comparable public pricing** — at least two or three named competitors' live pricing pages.

- ☐ **Demand separated into structural and seasonal** — a spike is not the same evidence as sustained growth.

03 Direct Competitors

The rivals everyone already tracks

- ☐ **Every named competitor checked on a company or funding database** — Companies House and a free-tier funding lookup are enough for a first pass.
- ☐ **Recent investment, acquisitions and leadership changes acknowledged** — silence about a well-resourced rival reads as ignorance, not confidence.
- ☐ **Positioning gaps mapped, not just feature lists** — where has a competitor left a segment, use case or price point unclaimed?
- ☐ **“No direct competitors” removed or replaced** — it usually signals an undefined category, not an open field.

04 Adjacent Players & Substitutes

Where blind spots actually live

- ☐ **Scope widened beyond the two or three competitors you already track** — deep knowledge of known rivals often comes with blindness to new entrants.
- ☐ **Substitutes listed** — what would a customer do instead of buying anything at all: spreadsheets, an agency, an in-house hire, nothing?
- ☐ **Adjacent-category players checked** — a company one category over that could move into yours with a small change.
- ☐ **This section re-run at least quarterly** — competitive data that is collected and never revisited rarely changes a decision.

WHY THIS SECTION STANDS ALONE

Tracking more metrics on the same competitors does not fix a scope problem. The rival that hurts you is often the one that was never on the list.

05 AI Visibility

How AI assistants describe your category — and you

- ☐ **Category prompt run in ChatGPT, Perplexity, Gemini and Claude** — e.g. “What are the best providers of [your category] in the UK?” — in a fresh, logged-out chat.
- ☐ **Comparison prompt run against your top named competitor** — “How does [you] compare with [competitor]?” — check accuracy, not just presence.
- ☐ **Factual prompt run** — “What does [company] do?” — flag any answer that describes an old offer or stale pricing.
- ☐ **Every wrong or missing answer traced to a gap on your own site** — vague “about us” copy gives these tools little to work with; specific, dated, sourced statements are easier to cite accurately.

FREE TOOL

Our free AI Visibility Signal runs this check for you across the main assistants: thrivefinity.uk/ai-visibility

06 Review Rhythm

The cadence that keeps this audit current

CADENCE	WHAT IT COVERS	OFF-SCHEDULE TRIGGER
Monthly monitoring	Pricing-page changes, new features, funding and hiring announcements	A competitor launches into your segment
Quarterly full review	Re-run all six sections of this checklist	Before a board meeting, a price change or a major launch
Ad-hoc deep dive	One section only, in response to a specific event	Any event big enough to shift your positioning

- ☐ **One named owner for the monthly pass** — usually a bigger improvement than another tool.
- ☐ **A recurring calendar slot for the monthly pass** — without a fixed slot, this decays the same way one-off research does.

WANT THIS RUN FOR YOU?

Verified, Cited and Signed.

A **Decision Brief** applies this four-angle check — market, buyers, competitors, trends — to one decision you are facing, and ends in a recommendation signed by a named verifier.

See how it works: thrivefinity.uk/decision-brief

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