

How to Conduct a Competitive Messaging Audit

**A STEP BY STEP GUIDE FOR EVALUATING
COMPETITIVE BRANDS**



Understanding your competitor's brand and messaging is crucial when differentiating your company, culture, products, services and more. It can provide key insights on what's resonating in the market and highlight new opportunities for your organization.

Whether you're looking to create a messaging framework from scratch, updating existing messaging, rolling out a new website, or just honing some of your content assets for sales and marketing, understanding the ecosystem of competitive messaging around you should be the first step. But completing a competitive messaging audit can be a time consuming and daunting process. To help, we've created this quick guide and framework to help streamline the process. Let's dive in.



Outlining the Audit

Like any project, it's first important to outline the different aspects associated with a competitive messaging audit. Having done this for many of our clients, there are four key steps to consider when planning.



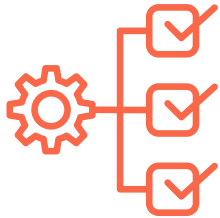
1. Identify the goal – Work to outline what problem(s) you're specifically trying to solve. This could be a rebrand of a specific business unit, messaging a new product, re-messaging an existing set of services, moving to the channel, etc. Defining the goal and what that translates into, such as website content, marketing assets or sales collateral, is key to ensuring the audit's success.



2. Determine which messages do you care about – Work to create a list of key message areas that are important to understand. Using the cybersecurity space as an example, these might include categories like hardware security, software reliability, attack types, deployment requirements, bug bounty programs, security pledges and more. Defining this up front significantly reduces the research burden.



3. Clarify what you are looking at – It's important to define what specific resources should be evaluated in an audit. Are you just looking at websites? Does this include social media posts, SEO programs, marketing, or sales resources? Defining the scope upfront will drive a concise analysis and results you can trust.



4. Define the deliverable – Before you start researching, define the framework for delivering the results. Often competitive messaging audits are shared across the organization and even with partners. Be sure it's in a format that's useful for everyone. A good approach is to use PowerPoint and start with a high-level summary that then transitions into more granular results as you progress through the deck. Some questions to consider:

- *Do you just want summaries or the complete source data?*
- *Should the results be in graphical format?*
- *Do you want each competitor broken out by resource type (see below)*
- *Do you want recommendations for messaging opportunities determined per competitor or holistically?*

Doing the legwork upfront to define these elements will ensure you're delivering a useful audit that's applicable for a broad range of teams.

What Resources to Analyze

Depending on industries, the resources worth evaluating may change. But consider the following key buckets when looking at competitive messaging:



Primary Website – This is obviously a big one. But sites can have hundreds of pages. Therefore, try to narrow down the scope to the home page and key product pages, the blog and news resource pages. Align this with the key topics you're trying to evaluate. There's no need to audit an entire website. Just focus on key areas.



Content Marketing Assets – Most companies have extensive content marketing assets (ebooks, webinars, etc.). It's key to audit these materials, but set some guardrails when doing so. Don't audit materials that are older than a year. Align your company's topics to the assets and then work off the titles to identify relevant content (there's no need to look at non-relevant assets).



Social Media – How a company messages around topics on social media can often be more casual than other areas of marketing. This provides unique perspectives around humanizing language, especially when dealing with technical topics. In the B2B space, focus primarily on LinkedIn and Twitter (and even look at sites like G2). If you're in the consumer space, focus more on Twitter, Facebook, Instagram, TikTok, etc.



Media, Blogs, and Thought Leadership – How a company positions itself with press or when contributing content can be important for understanding how closely it always sticks with corporate messaging, and where it pushes the boundaries. Work to identify a standard list of publications for the entire audit that's relevant to the overall market. Focus on 10-15 media outlets (this may include publications that accept contributed articles as well) with high domain authority, as well as 5-10 blog sites.



SEO and Keywords/Phrases – Understanding the keywords organizations are trying to rank for and what Google Ads they're buying allows you to be more strategic when creating (or updating) messaging. Create your list of keywords or cross reference an existing list to evaluate how you rank and where you're competitive.



Events – Companies often focus key messaging around events and speaking opportunities. Auditing these events can be quick and easy. Simply create your list of relevant events and then look at the speaking abstracts; this is often enough information to get a general idea of how messaging and events are intersecting.



Partnerships – Collaboration with other organizations is a key part of the business ecosystem. How companies' message with other organizations (partners, academia, standardizing bodies, etc.) can provide great perspective on corporate initiatives related to your key topic areas.

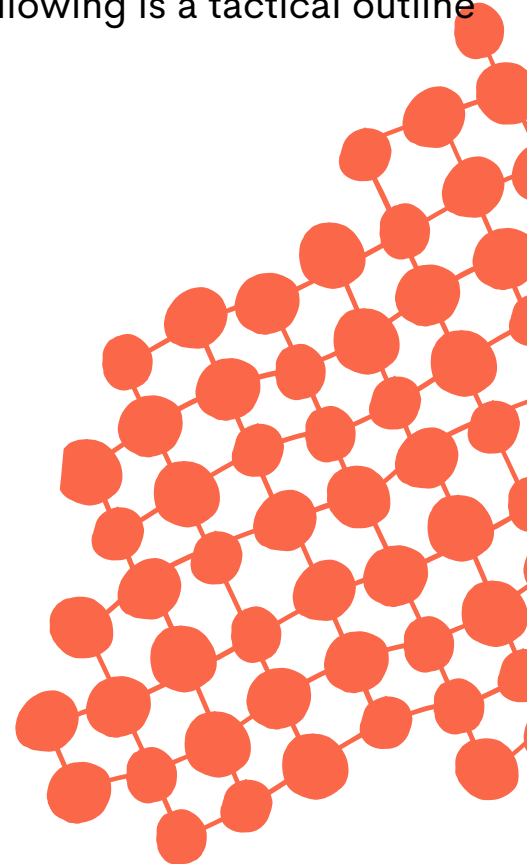


Analysts – While it may not yield a ton of results due to paid research walls, it's worth doing a quick search across the top five analyst firms in your market to see if they're writing on a competitor or given topic. This can provide a quick technical and market assessment of a competitor's messaging.

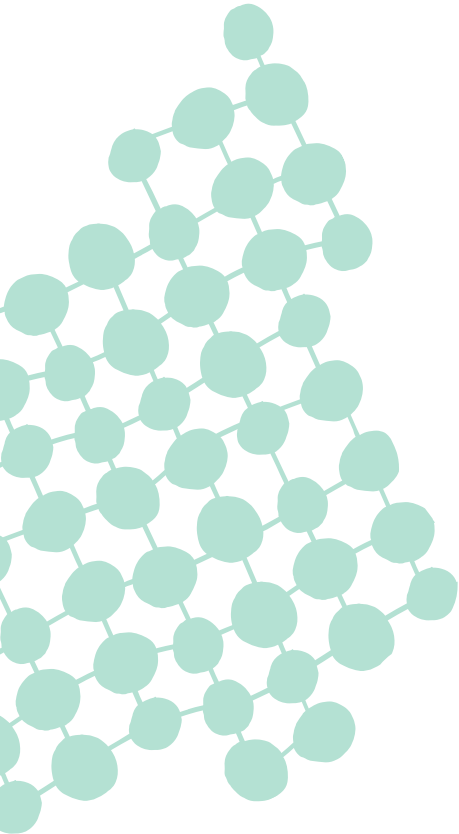
Creating a Framework

Depending on your organization, the goals, and who will be reviewing the audit, the deliverable framework may change. However, the following is a tactical outline example that may be useful to follow.

- **Title Slide**
- **Table of Contents**
- **How to Use This Deck** (useful if being created for multiple parties)
- **Executive Summary** (3-8 slides)
 - High level summary of results, a key message commitment matrix, top takeaways, key opportunities across resources like website, content creation, etc.
- **Competitive Messaging Summaries** (10-15 slides)
 - Break-down of each competitor and key messaging on each topic (and a link to source material matrix, such as a shared Google Doc), as well as some samples of specific messaging.



[Each of the following sections should generally include an executive summary followed by analysis per competitor of key takeaways.]



- **Website Messaging** (15-20 slides)
 - Include sample messaging (and a link to source material matrix).
- **Content Marketing Messaging** (15-20 slides)
 - Include sample messaging from relevant assets.
- **Social Media Messaging** (15-20 slides)
 - Include sample messaging from posts.
- **Media, Blog and Thought Leadership Messaging** (15-20 slides)
 - Include sample messaging from articles.
- **Keyword Analysis** (10-15 slides)
 - Include a breakdown of top organic keyword crossover, with volume, position, CPC, etc.
- **Event Messaging (15-20 slides)**
 - Include sample messaging from sessions or abstracts.

- **Partnership Messaging (15-20 slides)**
 - Include sample messaging from partners sources.
- **Analysts Messaging (15-20 slides)**
 - Include sample messaging from analyst content.
- **Key Company Opportunities (15-20 slides)**
 - Include a breakdown of key opportunities across resource types (website, social media, content marketing, etc.), creative storytelling ideas that are not being capitalized on by competitors (i.e., opportunity gaps), examples of content work emanating from competitors, opportunities for subject matter experts to interact with broader market, and more.
- **Company Messaging Audit (10-15 slides)**
 - Include the same analysis you did for the competitors on your own company.

Conducting a competitive messaging audit can be a time-consuming process, but when done correctly it provides the context an organization needs to properly position a brand within the larger marketplace. If your team lacks the resources to conduct an audit yourself, let's chat!

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