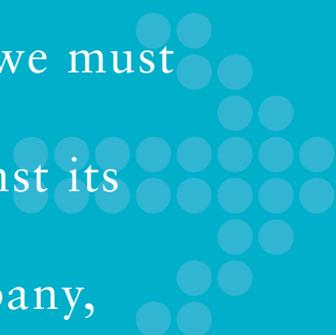




<b>Chapter 10. Analyzing Your Competition.....</b>	<b>1</b>
Formal Industry Analysis vs. Informal Features Analysis.....	3
Conducting an Analysis.....	5
Chapter Summary.....	18

- 
- > To become better partners with our clients, we must understand the client's industry online, against its competition. What are the goals of the company, product, and market as they relate to the web?

## Analyzing Your Competition 10



# Analyzing Your Competition

A competitive analysis should be part of the web re-design process no matter the level of approach — and the levels can get very lofty. With large, fiercely competitive industries such as commercial airlines or personal computer hardware, there might be both the need and the budget for a formal industry analysis. In these situations, plan on spending up to six figures for an outside marketing or research company to deliver an exhaustive document the size of Tolstoy's *War And Peace*. For projects without mammoth budgets, we recommend conducting an informal features analysis.

What's the difference between comparing industries and features? Expertise, budget, and approach. A full-blown formal industry analysis is generally conducted by marketing- and strategy-focused teams with solid research methodologies driven by experience. It focuses largely on markets and business positioning in a broad competitive landscape. A features analysis, whether formal or informal, focuses on comparing the actual customer experience — primarily online but sometimes offline as well. It provides a snapshot view of the competition's services and features from a customer standpoint.

The results generated from this analysis will be used by both the web development team and the client. The team gains the invaluable experience of being able to simulate the user experience within the client's industry. The client — whether external or internal — receives data that helps them see what their online competition is offering in the way of content, features, and services. Through conducting

## WHAT THIS CHAPTER COVERS

DEFINE AND PREP	CONDUCT AND ANALYZE
> Determining Analysis Plan	> Performing Evaluations
> Becoming an Expert in the Client's Industry	> Conducting Usability Testing
> Defining the Competitive Set	> Creating a Final Report
> Creating a Features List	

a features analysis, the team and the client each gain a better understanding of what is working and — just as important — what is not working for users.

When your site was first built, you (or your predecessor) probably surfed extensively to see who was doing what in your field. You leveraged some ideas from competitors and rejected others. Now that the site is being redesigned, it is time to take another, updated look. The industry has likely changed — even if it's only been a year since the site was originally built. Significant industry change may even be the primary reason why the site is being redesigned. Include the existing site in your analysis. Looking at the existing site alongside its competition enables you not only to compare features and audience expectations, but also to look at how the existing site measures up (or doesn't measure up) against the competition. This will help to establish redesign goals.

Throughout this book, we advocate hiring experts whenever possible. Conducting competitive analyses is no exception. Expertly gathered information is always incredibly worthwhile and usually hits on points that non-research types may not even consider. But conducting an informal features analysis is valuable for a different reason — it enables the team designing and developing the redesigned site to engage in the information-gathering process. Part of the value of conducting an informal competitive analysis is that it helps the team begin to think like your audience within the your industry, and that type of thinking is priceless.

## FORMAL INDUSTRY ANALYSIS VS. INFORMAL FEATURES ANALYSIS

Understand that the informal analysis we recommend in this chapter involves online features and customer experience, not marketing or branding or product analyses of the company's current or future business position. These other analyses may have already been developed by the company and may provide an understanding of where the company has been and where it is going — especially as it relates to redesign goals. Gather as much information from the client as you can during this Discovery process.

FORMAL VS. INFORMAL COMPARISON		
	Formal Industry Analysis	Informal Features Analysis
<b>Team</b>	An independent research team with expertise and background in marketing, communications, research, and/or strategy.	Members of the web development team who will be re-creating the user experience online.
<b>Approach</b>	Formal analysis of industry, market segmentation, trends and forecasts, and customer needs.	Informal analysis of competitive sites focusing on features and user experience.
<b>Results</b>	Quantitative data-driven, market- and research-centered focus.	Feature-driven, qualitative information; show what is working and what is not working.
<b>Report</b>	A huge book of information.	5 to 20 pages, short and sweet.
<b>Budget</b>	\$20,000 and up.	Lunch to \$20,000.
<b>Goals</b>	Provide comprehensive, detailed, strategy-based recommendations on changing marketplaces, evolving business models, and customer habits and segmentation.	Gain firsthand view of customer experience. Provide relevant documentation and industry information to the client.

## Obscure Industries

Unless the company's field is so technically obscure that you cannot understand even the basic terminology (for example, genetically engineered livestock food supplements, FAA-mandated commercial jet engine maintenance, or Shih-tzu breeding), you should be able to use and review several sites right away and form solid opinions. (Note: If you are redesigning a jet engine maintenance company's website, you should plan on a crash course in aeronautical terminology, hire yourself a jet engine expert, or better yet, have the client give you a detailed tour of their plant.)

The ultimate goal of a features analysis is quite direct in that it answers this question: What are competitors (and other “best practice” sites) doing to provide services and content that is positive and meaningful to users? For the purposes of this book, we focus primarily on online competition, though the brick-and-mortar world should not be ignored. Sometimes most, if not all, of your competition is offline and just a phone call away. But to analyze the entire industry is outside the scope of what we suggest. The job of the web development team as it embarks on a features analysis is to look at the goals of the company, product, and market as they relate to the web.

## Becoming an Expert in the Client's Industry

The process of becoming an industry expert begins much the same way as you might begin online research for personal reasons — with a search at Yahoo! or Google or the like and then visits to several competitor sites. Perhaps one of the site's products is fingerless fleece gloves. By plugging those three keywords, “fingerless fleece gloves,” into a search engine, you will get a dozen or more online catalog sites specializing in sporting wear or outdoor clothing. All these sites are in the same industry and therefore make up a competitive set. Perhaps some of them are even on the list of perceived competitors the

## Gaining a Customer Perspective

A small design group embarked on a complete redesign and rebranding of an online food delivery website. “Make it a better experience” was the goal. “Increase customer usage.” It was a straightforward challenge: Take a site and identify what needed to be changed and how the experience could be improved.

The team started by looking at other sites within the industry. Online food delivery, online grocery delivery, online dining guides, offline food delivery, cooking sites, etc. What worked with these sites? What didn't work? The only way to find out was to become actual users. The team compared site features. They went through check-out ordering processes. They registered and became members. They searched for restaurants and ordered

food — a lot of food. They called customer service to complain when food was delivered late or the orders were incorrect. They felt the pains of a user when a particular menu couldn't be found or a restaurant was closed. They quickly saw what was successful and why.

In the end, they became experts by doing. Not just observing or researching but being real users. What did they learn? The design needed to be simple and straightforward. The ordering process needed to be as easy as picking up the phone — even easier. They knew the site needed to do more, think faster, and perform better than the main competition: the offline, phone-in delivery services.

The upshot? The redesigned site wasn't just usable; it got used.

client provided (from the Client Survey in Phase 1: Define). By looking through many of these sites, you — a typical user for that industry — become better versed not only on the specific product but also on the industry itself.

A big theme throughout this book is to THINK LIKE YOUR CUSTOMERS. The competitive analysis is no exception. Approach this task with the mindset of a typical site visitor and “shop” through the client’s industry much the way you “shopped” for fingerless fleece gloves. Compare competitors. Use the competitors’ sites to complete transactions and find information. It takes time, but by being a typical customer on site after site within the competitive set, you quickly become an expert customer in your company’s industry. Be reasonable, of course. If your client’s company sells cars, you certainly don’t need to purchase several of the newest models. But take it as far as possible without committing serious dollars.

Analyzing the competition from an audience perspective enables you to remove yourself from your web developer’s get-it-done, make-it-work point of view. Making decisions based on things that matter to your audience — ease of use, likes and dislikes, and other fickle attributes that site visitors with little patience or aptitude might apply to their actual online experiences — helps immeasurably in understanding the your industry online.

### CONDUCTING AN ANALYSIS

Conducting a features analysis is a basic, easy-to-follow process that can be expanded or scaled back depending on time, resources, and budget. Whether 20 hours or 200 hours, the process contains the same four steps: define the process, create a features list, conduct analysis and usability testing, and lastly, create a report. Use the accompanying chart as a guide. Modify as your time, resources, and industry dictate.

#### Staying Current

Maintenance teams should regularly check in on the competition. Industries fluctuate and markets are volatile. Always know who you are vying with for online customers and visit those sites frequently. Is the competition introducing new features or functionality? Do any across-the-industry customer needs make themselves apparent? Fill them on your own site. Only by continual analysis can you know where you are within the pack.

#### In-House Expertise

If you are part of an in-house web development department, chances are you are already exceedingly familiar with your industry. Most likely, you have spent considerable time browsing through competitor sites... but how long ago? If your research is more than a year old, your industry’s online landscape has probably changed. Perhaps you have new competition. Perhaps your

competition is no longer in existence.

Perhaps you are too close. Internal teams are often biased and would benefit by having an outside team’s vantage point. Regardless of circumstance, being at the brink of redesign is a critical juncture at which the competition should be looked at closely ... and as objectively as possible.

STEP 1: DEFINING THE PROCESS	
<b>Build a Plan for Analysis</b>	Outline basic goals, process, and deliverables. Establish team, timeframe, methodology, allocated hours, and deliverables.
<b>Define the Competitive Set</b>	Using existing information, search engines, and research, identify a range of companies that fall into the competitive set.
<b>Categorize Your Competitive Set</b>	Break the defined competitive set into categories within the overall industry. Note that each site should fall into only one category.
STEP 2: CREATING A FEATURES LIST	
<b>Create a Features List</b>	After the initial evaluation, create a list of features that apply to most or all sites within the competitive set. Include relevant offline features. Break these features down into individual categories.
STEP 3: CONDUCTING ANALYSIS AND TESTING	
<b>Perform Individual Evaluations</b>	Each person working on the analysis should conduct an individual study of each site, answering basic questions about overall experience, perceived company objectives, and types of services provided. They should also add to the features list as they get deeper into the site.
<b>Conduct Informal Usability Testing</b>	Determine key tasks that can be conducted on most or all sites. Perform informal usability testing (see Chapter 8: Testing for Usability) and record observations and effectiveness from site to site.
STEP 4: CREATING A FINAL REPORT	
<b>Create a Features Grid</b>	Using the features list, create a comprehensive grid showing all sites and the categories and listing features that exist within each.
<b>Make Overall Evaluations</b>	Create a final report (in short, executive summary format). Outline the main findings and indicate how they apply to the company's direction and business goals. Follow with screenshots, evaluations, and summaries about each site in the competitive set. Include a features grid that lists main features within each site. Overall evaluations rank each site for overall use, usability, and likeability.

## Step 1: Defining the Process

Clearly identify what information you intend to generate. Specifically, who will be using the final results? Is this primarily to benefit the design team? To generate ideas for content? To better understand the industry? Have clear goals. Whether it is a budgeted deliverable for the client, an exercise for the team as part of the Discovery process, or both, define what you hope to gain from this analysis.

### Building a Plan for Analysis

Create a plan for analysis that details overall objectives, methodology, deliverables, schedule, and budget [10.1]. Competitive analyses differ widely in size and scope, depending on the details sought. Analyses should be conducted by at least two people because this allows for different perspectives. Depending on time and resources, this process can take a week (for small to mid-size budgets of 20 to 70 hours) or up to a month (for budgets of larger scale). If you can charge for this work, do so. Many firms conduct exactly this type of analysis and charge a meaningful fee for it. If you can't invoice for the competitive analysis on its own budgetary line, build the cost of an abbreviated analysis as part of the Discovery process.

## Defining the Competitive Set

The goal here is to identify several things: Who are the key industry players? The heavy hitters? The smaller firms with new innovations? The up-and-comers? Who are the ones to beat? Who are your client's direct competitors — the sites the target audience might visit in lieu of your client's?

First, choose broadly. Gather information the way an actual customer might: using search engines, marketing influences (what billboards have you seen lately?), and other resources like the phone book or referrals. Collect as much information as possible. The client already provided the team with a list of its perceived main competition (from the Client Survey). Now is the time to really look at those sites. Look beyond the client's list as well; the client might have a biased or narrow view of the industry or might have forgotten some key players, especially in the offline arena. This last bit might require extra sleuthing and research on your part.

### 10.1 >

*This is an example of an analysis plan that outlines overall goals and objectives, basic methodology, and deliverables. In a more detailed version, include specifics about team and project scope (with schedule and hours allocated) and details about both the user and general tasks associated with the company's site and industry.*

#### Competitive Analysis: Overview

##### Overall Goals and Objectives

Provide a comprehensive industry analysis and comparison of competitive sites. Evaluate features, technology, content, usability, and overall effectiveness. Compile a list of features in a matrix format to establish detailed site offerings and simple comparison methods. Generate a report of what works and what doesn't work within each site, individual site analysis and comments, and final recommendations for possible implementation into the redesigned site.

##### Methodology

The analysis will be conducted and compiled by team members including the Creative Director, Marketing Analyst, and Information Designer. Individuals participating in this analysis are classified as potential users and will be conducting several task-oriented tests for each of the sites with a user-based orientation instead of a developer's point of view. This analysis, though informal, will allow a range of observations, input, and overall use of each site.

The analysis will be conducted in three phases:

1. Individual analysis (heuristic)
2. Informal usability testing (task-oriented)
3. Features comparison

##### Deliverables

The report will contain a detailed overview of each site, including screenshots, specific features and differentiating factors, and ratings, which will include usability, ease of use, and overall rating. Also included will be a comprehensive features grid, which shows a breakdown of the competitive sites into specific industry categories, and specific features divided into graphic, technical, content, and site-specific categories. The final report will also contain overall recommendations for the possible implementation of specific features that were highly rated and should be considered in the site's redesign.

*(Note: The information compiled in this report is not statistically significant. It is based on general use and informal opinions and should be taken for recommendations only.)*

## Hours and Budgeting

At the barest minimum, allocate at least one hour to analyze each site in the competitive set, including testing, tallying features, and making recommendations.

It's simple math: A 12-site competitive set equals a solid day and a half of work, at minimum. Obviously, more time per site will yield better results; if you have the resources, several hours per site is advantageous. If you don't have the resources or budget, limit the number of sites you are analyzing or limit the time you spend analyzing each site.

Are there any sites that match your client's to a T? Select the primary ones. Also choose several others that are only partial overlaps. Here's an example: The redesign project is an online travel agency. Look at direct competitors' sites — other travel agency sites — as well as at portals like Expedia.com or Travelocity.com, and don't forget airlines like southwest.com or united.com. Also consider more specialized travel sites, like one or two of the many and widely varied adventure travel sites such as Away.com, and don't ignore brochure sites like Lonely Planet or Let's Go. Keep in mind that there are also offline competitors such as 1-800 numbers, 24-hour customer service lines, and (gasp!) actual travel agencies with storefronts or phone-in customer-service representatives.

Now narrow your competition. Limiting the analysis to 12 sites or fewer can be a difficult task. There are bound to be dozens, even a hundred, depending on the industry. Choose roughly 20 for starters. Sorting them will pare that number down. You should have as many sites as necessary to give you a broad yet focused perspective on your industry. Have at least five but no more than a dozen. Presented here is an example of a competitive set within the travel industry ([10.2] to [10.7]).

The client's site? The existing, getting-redesigned site? Make sure to include it in the competitive set. The redesign goals will become more focused if you can clearly see what needs attention alongside competitors' sites.

< ANALYZING YOUR COMPETITION >



< 10.2 >  
Expedia.com: [www.expedia.com](http://www.expedia.com) (Category: portal).



< 10.3 >  
Travelocity.com: [www.travelocity.com](http://www.travelocity.com) (Category: portal).



< 10.4 >  
Netscape Travel Center: <http://webcenter.travel.netscape.com> (Category: search engine portal).



< 10.5 >  
Away.com: [www.away.com](http://www.away.com) (Category: adventure travel).



< 10.6 >  
Lonely Planet: [www.lonelyplanet.com](http://www.lonelyplanet.com) (Category: brochure site).



< 10.7 >  
United Airlines: [www.united.com](http://www.united.com) (Category: airlines).

## Partial Analysis

A competitive analysis can focus on a specific feature or functional item of the site. It does not have to be industry specific. For example, when creating an online ordering process for a particular services package, you might want to conduct an analysis of various ways in which people select and order similar services. First you will want to look at industry competitors. Then you may want to branch out and research a similar process in different consumer industries. The point is that you need not analyze your entire site against the competition. Test a portion; keep it simple and specific. Check what works and what doesn't by actually going through the process using heuristic evaluation techniques (usability testing with just one person — yourself!).

## Categorizing Your Competitive Set

You have your list; now quickly evaluate each site (a five-minute evaluation, nothing intensive) for category placement within the industry. Start with the existing site: Where does it fit into its industry's big picture? These are broad categories; don't get too specific. Looking back at the travel industry example, categories might be eco-tours, adventure travel, travel portals, airlines, etc. All are definitely travel sites, but each specializes. If you are working on something as specific as Shih-tzu breeding, make sure you look at sites that focus on other small breeds. Be imaginative. Investigate related categories such as purebred dog shows or veterinary obstetrics.

The idea here is to sort and categorize. Although

you may have a category with several sites in it, each site should be in only one category. This limiting factor will help clarify true market segmentation and will undoubtedly simplify the total process. Determine industry relevance. Make final cuts.

## Step 2: Creating a Features List

A features list is a concise inventory of what each of the selected sites has to offer ([10.8] and [10.9]). Content, graphics, media, functionality, things to do, things to see, actions to take... List them all. Take all elements into consideration. Identify the download speeds and graphic weight of the different competitive sites. Include features such as search, registration, and message boards. Determine the best

### Scarcity of Choices?

What if there aren't even five sites for your comparison? You may have been the first in your industry to go online, or perhaps you found a niche with essentially no competition. Much of the reason you are conducting the informal features analysis is to get deep into the company and to discover what it is like to be a customer in this particular industry. Get creative. If you are unable to find more than three to five sites to compare within your industry, or if most of the competition is offline or traditionally functioning (brick-and-mortar types), try to find areas of similarity

with other sites and companies. Look for similar information, similar choices, similar e-commerce functionality. Begin to test functions against your site. If need be, assess the offline competition in greater depth. How? Explore, purchase, and contact offline competition through traditional means. Locally, this might mean driving to a facility or store. Nationally, it might entail contacting the company by phone and requesting a catalog or other information.

navigation methods. Customize your features list to best fit the industry. Keep it feasible and within budget; an exhaustive list is not necessary. You can get a comprehensive view of the online competition without listing every last feature on every last site.

While evaluating a site, rank the importance of each feature. Determine how it applies to the overall site goals. Decide as a customer if you like it or hate it, or could take it or leave it. Be as diligent and as detailed as possible in the time allowed. In the final competitive analysis report, you will compile these features lists and create a grand master grid for an ultimate comparison experience.

### Step 3: Conducting Analysis and Testing

With the competitive set defined and the features list created, you are ready for the actual “doing” part. Gathering data from each site in the competitive set is the most laborious part of the entire analysis. This is the step, depending on the depth and complexity of research conducted, that can quickly blow a budget.

We present two approaches here: individual evaluation and informal usability testing. Each will work on its own, or you may determine that your budget will only allow for one approach (individual evaluation). Again, determine what your goals are for the analysis and testing and be realistic with time and resources.

#### Brainstorming for Features

When generating a features list, begin by logging every feature (graphics, content, functionality, etc.), then narrow down to specific categories, and finally hone in on features that repeat across several sites. In the end, the features listed and compared should cover as many sites as possible but need not go across the board. The final number of features compared will depend on resources and the detail desired, but a target of 20 to 30 after narrowing down is a good goal. Here are some things to look for as you begin your features list:

- **Media.** Audio clips, video clips, etc.
- **Graphics.** Splash screen, Flash animation, GIF animation, frames, ads, etc.
- **Content.** Press releases, a description of products/services, a company description, bios, a client list, whether the content is static or dynamic, etc.
- **Functionality.** Search, login, community boards, online chats, registration, online purchasing, security, etc.
- **GUI:** High design? Lame design? Professional looking or do-it-yourself?

Graphic & Content Comparison	Competition A Brochure-site	Competition B Interactive	Competition C Dynamic
Company Name			
Company URL	samplea.com	sampleb.com	samplec.com
Site Classification	brochure	destination	portal
Frames based	x		
Use of animation	x		
Splash screen	x		
Scrolling on homepage		x	x
Scrolling content on sub-pages		x	x
Graphic buttons	x		
Text/HTML links		x	x
Ad on homepage			x
URL on homepage	x	x	x
Printable homepage	x	x	x
Global navigation on subpages	x	x	x
Sitemap/Site Index		x	x
Dynamic content (changes daily)			x
Rollover navigation	x	x	
Email or feedback ability	x		
Pull-down menus		x	
Download less than 50k		x	x
Total # of features per site	9	10	10
Rank Effectiveness:	*	**	****

< 10.8 >

Here is a generic example of graphic and content features that might appear on competitive sites. Note that this example focuses on graphics and functionality...

Feature Comparison	Competition A Brochure-site	Competition B Interactive	Competition C Dynamic
Company Name			
Company URL	samplea.com	sampleb.com	samplec.com
Site Classification	brochure	destination	portal
Search Function		x	x
Contests/Games	x	x	x
Email	x	x	x
E-Commerce	x		x
Ad Banners		x	x
Chat			x
Press Releases	x	x	x
Company Information	x	x	x
Video/Music Clips		x	x
Web Links	x	x	x
Contact Information	x	x	x
Client List	x	x	x
Feedback	x	x	x
Message Boards			x
Flash Animation		x	x
Other	x	x	x
Total # of features per site	10	13	16
Rank Effectiveness:	*	**	****

< 10.9 >

...And this example is content oriented. Your features list should be likewise grouped.

## Categorizing

Make categorizing easier by using self-stick notes. Spread out on a conference table or use a big, white, dry-erase board. Draw a grid and create initial categories. Print out the company logos and URLs and tape the information to the notes. Place the companies in the appropriate categories on the grid. Rename categories if you need to split them (the dry-erase board is handy for that) or move sites to other categories if it becomes appropriate (self-stick-note mobility makes this a snap). Remember, each site should fall under only one category. Some, like portals, will logically qualify for more than one category, so select the category that best fits.

### Performing Individual Evaluations

After all sites in the competitive set are appropriately checked against the features list, each evaluator should give his or her opinion on each site from a customer perspective. Prepare a simple document [10.10] to fill out for each site in the competitive set. Take a look at each site in detail. You did so while checking for features; do more now if time and budget allow. The more you investigate the competitive set, the better versed in the industry you will be.

### Conducting Informal Usability Testing

Informal usability testing takes the evaluation a step further. If you have the resources, we highly recommend testing a feature or two across the competitive set for ease of use. Identify some basic tasks that can be performed within the set of competitive sites. If there is more than one audience for your redesign project, choose tasks aimed at each audience.

Consider again the travel industry. How hard it is to find and book a trip for two to Tokyo? To check on flight arrival times? Try to find a motel in Madagascar, a rental car in Reykjavik, or hiking trails in Helsinki. If you are doing an analysis on the lighting industry, order some light bulbs. How easy or difficult it is to find the size, type, and brightness you want? Now wait a few days until your order actually arrives. Return a few items. How easy is that? Call customer service for assistance. Complain. Be an actual customer.

**10.10 >**

*This individual evaluation worksheet outlines some of the basic things you should think about when taking a look at each website during the individual analysis.*

Competitive Analysis	Site:
<hr/>	
<b>Date:</b>	
<b>Tester name:</b>	
1. What is your initial response to this site?	
<hr/>	
<hr/>	
2. After a brief examination (less than five minutes), please describe your impression of this company's purpose.	
<hr/>	
<hr/>	
3. List the services that this site provides.	
<hr/>	
<hr/>	
4. Using a rating of 1–5, 1 being poor, 5 being excellent, rate the following aspects of the site:	
Ease of use:	1 2 3 4 5
Look & feel:	1 2 3 4 5
Navigation:	1 2 3 4 5
Overall:	1 2 3 4 5
5. Additional comments:	
<hr/>	
<hr/>	
<hr/>	
<hr/>	

Travel.com Competitive Analysis
Expedia.com

**Classification:** Portal Site

Expedia.com meets users' needs. It is a travel portal that enables a user to search easily for flights and make online reservations, book hotels and plan an effective vacation. Personalization on the site enables quick and easy flight booking and a one-button flight reference area. Clear labeling and copy enables a user to feel comfortable navigating the site.

excerpt from the food.com website

**Effectiveness Rating**  
 Overall Experience: ☆☆☆ 1/2  
 Functionality/Ease of Use: ☆☆☆  
 Look & Feel: ☆☆☆ 1/2  
 ☆ = worst    ☆☆☆ = best

< 10.11

*This final report sample page shows one of the sites being analyzed, along with several subscreens. This page will have an overview and will take the ratings (from the bottom of the final grid) to give an overall ratings score.*

Depending on the objectives of your redesign project, these tasks might be very simple or highly complex. For the most part, this type of testing will be more in-depth than what one site visitor can accomplish in one hour. You will want to analyze tasks from start to finish, and in some cases, that will require actual purchases. Invest a little time and money. The results are worth it.

### Step 4: Creating a Final Report

Putting your findings and information together in official report format is the final step of competitive analyses, regardless of formality. The final report will be most effective if it is put into an “executive summary,” easy-to-read (easy-to-skim) format. In one or two pages, convey your top findings and recommendations. Get straight to the point. What were the most surprising results? What made the customer experience a positive one? What was infuriating? The rest of the report should explain methodology and process and should include screenshots and overview pages of the sites reviewed, along with the comparison grids you so painstakingly produced (and checked and double-checked) [10.11].

Obviously, the formality of the final report depends on whom it is for: the web development team or the client. Most often it is for both. Primarily, the entire competitive analysis is for the team to wrap its collective head around the project. However, this exercise can be extremely valuable as a deliverable to the client as well — especially if the client is starting to evaluate its services and features for a redesign. This report can show what other industry leaders or competitors are offering, which is important in evaluating what content should appear on the new site.

### Creating a Features Grid

Before completing the report, we highly recommend taking the time to compile the gathered information into a visual grid. Take the features list for each site analyzed and merge them, putting features down the side and sites across the top. Put the existing site first. Add your usability-tested tasks into your features grid. Chunk the features together into comprehensive categories such as “Search” and “Personalization.” List subcategories if further definition is necessary [10.12]. This grid will probably be several pages long, but the more detailed and specific the features list, the more comprehensive the report.

#### The Final Report Should Contain at Least the Following:

- An executive summary (a one- to two-page overview)
- A description of the methodology/process/approach
- Screenshots and an overview of each site (two to three screenshots, final ratings from the grid, a brief overview of collected experiences)
- Findings and recommendations (can be included in the executive summary or expanded as necessary)
- A features grid (created next)
- Overall ratings (included in the features grid)
- Notes and raw data

Site Name	Travelocity.com	Expedia.com	travelnow	Yahoo/Travel	Netscape/Travel	Lufthansa	Icelandic Air	Southwest	Alaska	United	Away.com	LonelyPlanet
<b>CLASSIFICATION</b>	Portal Sites					Airline Sites					Adventure Travel	
<b>GENERAL FEATURES</b>												
Search for Flights									•	•		
Make Online Reservations												
Search for Hotels	•	•	•	•	•		•				•	•
Make Online Hotel Reservations	•	•	•	•		•	•				•	•
Search for Rental Cars	•	•					•				•	•
Search for Vacation Packages	•	•					•				•	
Customer Service 1-800#	•	•				•	•				•	•
Customer Service Online Chat												•
<b>BOOK FLIGHT FEATURES</b>												
Search for Flights			•									•
By City			•									•
By Date	•	•					•					
By Price	•	•	•	•	•	•	•	•	•	•		
Sort Flights		•				•	•	•			•	•
By Airlines	•	•									•	•
By Lowest Fare											•	•
By Non-stop											•	

< 10.12 >

This is a sample features grid for the travel industry showing the 12 selected sites in three categories: portals, airline sites, and adventure travel. The features (listed on the left) are then compared across the board for a direct side-by-side comparison.

**Note:** This is a sample used for display purposes only and should not be considered actual data.

### Making Overall Evaluations

At the end of the analysis, prepare two evaluations. First give an overall rating for each site in the competitive set. Select at least three main areas to evaluate and use a standard rating system of one to five stars ([10.13] and [10.14]). Get feedback from all involved — one team member may have had a horrible experience with a site, and another may have had major success. The main areas for rating might include the following:

- **Overall experience.** What was the general experience when using the site? Favorable? Frustrating? Did you feel the company was responsive to your needs as a customer? Were you able to complete tasks successfully? Would you want to return to the site?
- **Functionality.** From a functionality standpoint, was it easy to complete actual tasks, or did you hit dead ends? Was registration and ordering problematic or smooth?
- **Look and feel.** Was the site visually appealing? How did it make you feel about the company or the brand? Did it appear professional, targeted, and clean? Did it seem dated, overloaded, or badly executed?

Another form of evaluation is a more comprehensive, written piece summarizing the experiences, pros and cons, and overall impression of the site from a collection of customer responses. This summary should be accompanied by screenshots, be brief and to the point, and outline the most relevant findings.

**10.13 >**

*Ratings for overall experience, functionality, and look and feel are shown here. Also included is the K size for the home page download for comparison purposes.*

Ratings								
Overall Experience	★ ½	★★	★★ ½	★ ½	★★ ½	★	★★	★★★★★
Functionality	★ ½	★★★	★★ ½	★★	★★★	★	★★	★★★★★
Look & Feel	★★ ½	★★	★★	★	★ ½	½	★★	★★★★★
Homepage Download (graphics only)	54K	10K	30K	120K	8K	24K	18K	110K 2nd page

\* = Recommended feature  
 (●) = Hidden feature

**10.14 >**

*For individual site overview pages, relist the ratings information next to screenshots of each site [10.11].*

**Effectiveness Rating**

Overall Experience: ★ ★

Functionality/Ease of Use: ★ ★ ★

Look & Feel: ★ ★

★ = worst      ★ ★ ★ ★ ★ = best

## CHAPTER SUMMARY

Out of a need to become better partners with our clients, conducting analyses like the informal features analysis described in this chapter is a valuable part of the Discovery process. Although the final report is often surprising and sometimes enlightening, understand that the process itself is as important as the results for one big reason: It enables both the client and the development team to see the client's industry from a customer's perspective. Yes, you are evaluating the industry's current online and

offline competitive landscape and are making pertinent comparisons. And yes, those results go a long way toward understanding how the client's company fits into its competitive set. But as a web development team, the ultimate point of this analysis is to achieve a better understanding of the client company's site that's slated for a redesign, the overall industry, and the customer experience for which you are ardently aiming.