



B2B Sales BattleCards - User Guide

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Getting Started

Account Setup

1. **Email Registration:** Enter your email and password. New users will automatically have an account created.
2. **Email Verification:** Check your email for a verification link before accessing the full application.
3. **Security:** Use a strong, unique password and always log out on shared devices.

Creating Your First BattleCard

1. Click "+ **New BattleCard**" from the home screen
2. Start with the **Basic** tab to establish company fundamentals
3. Progress through each tab systematically

Understanding the Tabs

1. Basic Tab

Purpose: Establish foundational company information

Key Fields:

- **Business Name:** The company you're analyzing
- **Type:** Select primary business model (Manufacturer, Distributor, Retail, Service, Technology, Public)
- **Status:** Your relationship (Existing customer, New Prospect, Competitor)
- **Market Reach:** Geographic scope (Local, Regional, International)
- **Business Stage:** Current maturity level (see detailed explanation below)
- **Sympathies:** Relationship strength on a 1-10 scale

2. Channels Tab

Purpose: Map go-to-market strategy and channel effectiveness

Channel Types:

- **Web:** Direct online sales
- **B2B:** Business-to-business partnerships
- **Retail:** Physical or online retail presence
- **Other:** Specify custom channels

Critical Rule: Channel percentages must total exactly 100% to proceed with exports.

3. Assessment Tab

Purpose: Evaluate organizational capabilities using strategic quadrants (see detailed explanation below)

4. Products Tab

Purpose: Analyze product portfolio and competitive positioning

- Map each product's current vs. potential market share
- Document specific problems and strategic plans
- Identify growth opportunities and barriers

5. Team Tab

Purpose: Map buying team dynamics and stakeholder influence

- **Power Level:** Decision-making authority (1-5 scale)
- **Support Level:** Attitude toward your solution (-2 to +2 scale)
 - Positive numbers = supportive
 - Negative numbers = resistant
 - Zero = neutral

6. Process Tab

Purpose: Track buying process and procurement requirements

- **Buying Stage:** Current position in their decision process
- **Value Hypothesis:** Your one-line value proposition
- **Procurement Constraints:** Legal, security, budget approval requirements
- **Risk Assessment:** Identify and rank potential deal risks

7. Summary Tab

Purpose: View derived insights and strategic recommendations

- Auto-calculated health scores
 - System-generated strategic plays
 - Quadrant interpretations
 - Final insights and action items
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Capability Assessment Quadrants

The assessment tab uses four strategic quadrants to evaluate organizational strength:

Management Quadrant

X-Axis (Capacity): Leadership resources and organizational structure

- **Low (1-5):** Few leaders, limited organizational depth
- **High (6-10):** Strong leadership team, well-structured organization

Y-Axis (Performance): Strategic execution effectiveness

- **Low (1-5):** Poor decision-making, delayed execution
- **High (6-10):** Quick decisions, effective strategy implementation

How to Assess:

- Review recent strategic initiatives and their outcomes
- Evaluate leadership team depth and experience
- Consider organizational response time to market changes

Sales Quadrant

X-Axis (Capacity): Sales team size and coverage

- **Low (1-5):** Small sales force, limited market coverage
- **High (6-10):** Large sales team, comprehensive market reach

Y-Axis (Performance): Sales effectiveness and results

- **Low (1-5):** Missing targets, poor conversion rates
- **High (6-10):** Consistently exceeding goals, strong close rates

How to Assess:

- Analyze recent sales performance vs. targets
- Evaluate sales team experience and expertise
- Consider market coverage and customer acquisition rates

Marketing Quadrant

X-Axis (Capacity): Marketing budget and resources

- **Low (1-5):** Limited marketing budget, small team
- **High (6-10):** Substantial marketing investment, dedicated resources

Y-Axis (Performance): Marketing effectiveness and brand strength

- **Low (1-5):** Weak brand recognition, poor campaign results
- **High (6-10):** Strong brand presence, effective demand generation

How to Assess:

- Review marketing campaign performance and ROI
- Evaluate brand recognition in their market
- Consider digital presence and thought leadership

Market Placement Quadrant

X-Axis (Price): Pricing position in market

- **Low (1-5):** Budget/economy pricing
- **High (6-10):** Premium pricing

Y-Axis (Quality): Perceived quality and reputation

- **Low (1-5):** Commodity perception, quality concerns
- **High (6-10):** Premium quality reputation, differentiated offering

How to Assess:

- Compare pricing to competitors
 - Review customer testimonials and case studies
 - Evaluate product quality and service delivery reputation
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Business Maturity Stages

Understanding business stage is crucial for strategic positioning:

StartUp

Characteristics:

- Less than 3 years old or new market entry
- Rapid growth but unstable revenue
- Limited resources and established processes
- High risk, high potential reward

Recognition Signs:

- Frequent pivots in strategy or product
- Small but passionate team
- Limited customer references
- Seeking initial market validation

Strategic Approach: Focus on proving value quickly, provide implementation support, keep agreements flexible

Growth

Characteristics:

- Proven business model with accelerating revenue
- Expanding team and market presence
- Established product-market fit

- Seeking to scale operations

Recognition Signs:

- Consistent quarter-over-quarter growth
- Active hiring and expansion
- Seeking operational efficiency tools
- Strong customer acquisition momentum

Strategic Approach: Position for scale, offer growth-enabling solutions, establish long-term partnerships

Maturity

Characteristics:

- Stable, established market position
- Predictable revenue and operations
- Focus on efficiency and optimization
- Market share protection

Recognition Signs:

- Steady, predictable financial performance
- Established processes and systems
- Focus on cost optimization
- Defensive competitive strategies

Strategic Approach: Emphasize ROI and efficiency gains, leverage their stability for long-term deals

Portfolio

Characteristics:

- Multiple business units or declining core business
- Focus on asset optimization
- Potential divestiture or restructuring
- Cost management priority

Recognition Signs:

- Discussing business unit sales or closures
- Emphasis on cost reduction over growth
- Complex organizational structure
- Declining market position

Strategic Approach: Focus on immediate cost savings, be cautious about long-term commitments, consider transition services

Channel Strategy

Channel Mix Analysis

The system analyzes your channel strategy effectiveness:

Balanced Portfolio (Green): Percentages total 100% with reasonable distribution **Needs Adjustment (Red):** Percentages don't total 100% or over-concentrated in one channel

Channel Effectiveness Indicators

- **Web Dominant (>60%):** Digital-first strategy, scalable but may lack personal touch
 - **Retail Heavy (>50%):** Traditional approach, personal relationships but limited reach
 - **B2B Focused (>70%):** Partnership-driven, leverages others' relationships
 - **Diversified:** Balanced approach reducing risk but requiring more management
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Strategic Analysis

Health Score Components

The system calculates overall strategic health using:

- **30% Capability** (average performance across functions)
- **20% Capacity** (average resources across functions)
- **20% Market Placement Fit** (price-quality positioning)
- **15% Relationship Intimacy** (stakeholder connections)
- **15% Growth Stage Score** (business maturity factor)
- **Penalty** for unbalanced channel mix

Interpreting Quadrant Classifications

High-High (HH): Strong position, reliable partner **High-Low (HL):** Resources exist but execution problems **Low-High (LH):** Efficient but limited scale **Low-Low (LL):** Weak position, high risk

Strategic Plays (Auto-Generated)

The system suggests actions based on your assessment:

- Capability gaps trigger enablement recommendations
- Capacity constraints suggest focus or expansion needs

- Poor placement suggests positioning improvements
 - Relationship gaps highlight networking needs
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Export Features

PDF Export

Creates a professional strategic assessment document including:

- Executive summary with key metrics
- Capability matrix visualization
- Strategic priorities and action items
- Complete stakeholder and product analysis

AI Export

Generates structured JSON data optimized for AI analysis tools:

- Complete strategic assessment data
- Suggested analysis prompts
- Ready for import into AI tools for deeper insights

Usage: Copy the exported data and paste into Claude, ChatGPT, or other AI tools with prompts like: "Analyze this strategic assessment and provide recommendations for..."

Best Practices

Data Collection

1. **Start with publicly available information:** Company website, LinkedIn, financial reports
2. **Gather intelligence systematically:** Don't skip tabs - each builds on the previous
3. **Update regularly:** Set quarterly review reminders
4. **Validate with multiple sources:** Cross-check your assessments

Assessment Accuracy

1. **Be objective:** Separate what you want to see from what actually exists
2. **Use evidence:** Base quadrant positions on specific examples
3. **Consider trends:** Is performance improving or declining?

4. **Seek external perspectives:** How do others view this company?

Strategic Application

1. **Focus on gaps:** The biggest opportunities often lie in capability gaps
2. **Align solutions:** Match your offerings to their strategic needs
3. **Time appropriately:** Respect their buying process stage
4. **Build relationships:** High intimacy scores correlate with deal success

Security and Privacy

1. **Use strong passwords:** Each BattleCard contains sensitive competitive intelligence
 2. **Log out properly:** Especially on shared devices
 3. **Regular backups:** Export important BattleCards as PDFs
 4. **Access control:** Don't share login credentials with team members
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Troubleshooting

Common Issues

- **Can't export:** Check that channel percentages total 100%
- **Auto-save not working:** Check internet connection
- **Missing data:** Refresh the page to sync latest changes
- **Email verification:** Check spam folder for verification emails

Getting Help

- Download the complete PDF guide from the application
 - Contact support for technical issues
 - Regular updates improve functionality - refresh periodically
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Remember: The BattleCard is only as good as the intelligence you put into it. Invest time in accurate assessment for maximum strategic value.