B2B/SaaS Competitor Qualification Decision Handoff

A stable, reviewable record for one candidate, one exact offer and one defined buying decision.

DOCUMENT VERSION
1.0.0

METHOD VERSION
`1.0.1`

DECISION ID
Complete before review

RECORD ID / VERSION
Complete before review

OWNER
Name and role

REVIEWER / DATE
Separate from calculated outcome

Use boundary. This handoff qualifies a candidate only for the stated decision, offer, account/segment, geography and evidence date. It does not establish a legal market, market share, customer intent, complete competitor universe or a complete direct, indirect, substitute and reference competitor classification.

DECISION SCOPE

1. Decision boundary

DECISION OR ACTION
What consequential action will this analysis support?

CANDIDATE AND EXACT OFFER
Organization plus product, plan, service or workflow

TARGET ACCOUNT OR SEGMENT
Company type, size, vertical and buying group

MATERIAL GEOGRAPHY
Country, region or language market; or “not material”

EVIDENCE CUT-OFF DATE
YYYY-MM-DD

SCOPE CONFIRMATION
Confirmed / Unconfirmed, with decision owner

Scope validity check

- The decision/action, candidate, exact offer and target segment are complete.
- Geography is complete when it can change availability, procurement, regulation, language or serviceability.
- The evidence cut-off date is valid.
- The decision owner explicitly confirms the scope.

Refusal rule. If the scope is absent, incomplete or unconfirmed, return **REFUSED — DEFINE THE DECISION FIRST**. Do not continue to a competitor classification.

Decision owner and review context

Field	Record
Decision owner	*Name, role and approval date*
Reviewer	*Name, role and review date*
Intended analytical use	*Positioning, product, content, sales, investment or another bounded use*
Consequential-use note	*Why reviewer approval is proportionate*

2. Inputs, validations and outcomes

Step	Input	Accepted state
1	Account and buying-group fit	Supported / No fit / Unknown / Contradictory
2	Problem and outcome fit	Supported / No fit / Unknown / Contradictory
3	Offer and workflow relationship	Like-for-like product; Partial product; Suite/platform; Service/managed service; Internal build/open source; Manual/status quo; No material overlap; Unknown; Contradictory
4	Commercial and technical feasibility	Supported / No fit / Unknown / Contradictory
5	Context contribution	Material named context / None / Unknown / Contradictory
6	Evidence note and source date	Non-empty note plus valid source/observation date

Required order

1. Confirm decision scope first; invalid scope produces Refused.
2. Check the evidence record; incomplete evidence produces Review required.
3. Validate controlled values; malformed inputs produce a technical error and no disposition.
4. Contradictory evidence takes precedence over Unknown.
5. Determine competitor, alternative, context or exclusion.
6. Confirm all thirteen outputs are complete before handoff.

QUALIFIED COMPETITOR
Supported account, outcome and feasibility plus a like-for-like product relationship.

QUALIFIED ALTERNATIVE
Supported fit plus the exact partial, suite, service, build/open-source or manual/status-quo subtype.

CONTEXT ONLY
Material no-fit/no overlap plus a named contextual use.

EXCLUDE
Material no-fit/no overlap and no named context.

REVIEW REQUIRED
Evidence record incomplete, Contradictory, or Unknown.

REFUSED
The decision boundary is not ready for classification.

PUBLIC HANDOFF FIELDS

3. Qualification handoff template

Output	Decision record
Disposition	*Qualified competitor / Qualified alternative / Context only / Exclude / Review required / Refused*
Decision basis	*Scope, evidence, contradiction, uncertainty, fit, context or input-integrity basis*
Decision scope	*Decision, segment, geography and evidence cut-off*
Candidate and exact offer	*Organization — scoped offer*
Decisive reasons	*Evidence-backed reason for the decision basis*
Alternative subtype	*Exact subtype, or "NOT APPLICABLE — outcome is not Qualified alternative"*
Missing or contradictory evidence	*Named gaps/conflicts, or "None recorded for this decision"*
Permitted analytical use	*The lane this record may support*
Prohibited inference	*What the record must not be used to claim*
Reviewer requirement	*Required reviewer and approval condition*
Reopening trigger	*Specific event that requires a successor review*
Evidence note and date	*Summary, reference and source/observation date*
Method version	`1.0.1`

Output completeness. handoff is incomplete when any applicable field is missing. No field disappears because it is inconvenient or because the outcome is not final.

4. Evidence, reviewer control and reopening

Evidence record

Field	Record
Evidence note	*What supports the input states?*
Source or observation reference	*URL, file, approved customer record or observation label*
Source or observation date	*YYYY-MM-DD*
Known limitation	*Scope, availability, independence, geography or implementation limit*

Evidence boundary. This record stores evidence; it does not certify reliability, confidence or truth. Do not convert Unknown or Contradictory evidence into a neutral numeric value.

Reviewer decision

Review field	Record
Decision	*Approved / Returned / Review required / Superseded*
Reviewer and date	*Name, role, YYYY-MM-DD*
Reviewer rationale	*Confirm input states, use boundary and proportionality*
Return reason / next action	*Specific evidence or scope action*

Reopening triggers

- Decision, segment, geography or buying group changes.
- Offer, packaging, pricing, deployment, contract or service model changes.
- Procurement, security, integration or regulatory evidence changes feasibility.
- Unknown or Contradictory evidence is resolved or reappears.
- A candidate gains or loses realistic substitutability or a named context.
- The evidence cut-off is no longer appropriate.

ILLUSTRATIVE FICTIONAL COMPOSITE

5. Worked example — FlowCore Enterprise

Fictional decision: select candidates for a positioning and product-investment analysis for Northstar Workflow Systems' enterprise workflow platform serving regulated financial-services operations teams in the UK and EU over the next 12 months.

Output	Fictional record
Disposition	**QUALIFIED COMPETITOR**
Decision basis	Supported like-for-like fit
Decision scope	Positioning and product-investment candidate selection | Regulated UK/EU enterprise operations teams | Evidence cut-off 2026-07-22
Candidate and offer	FlowCore Enterprise — enterprise workflow automation platform
Decisive reasons	Account and buying-group fit, problem/outcome fit and feasibility are Supported, and the scoped offer is like-for-like.
Alternative subtype	NOT APPLICABLE — outcome is not Qualified alternative
Evidence gaps	None recorded for this decision
Permitted use	Primary bounded like-for-like analysis for the stated decision.
Prohibited inference	No legal-market, market-share, universal-role or customer-intent inference.
Reviewer requirement	Reviewer approval required for consequential use.
Reopening trigger	Reopen after a material change to scope, offer, fit, feasibility or evidence.
Evidence note/date	Fictional evidence note: same buying group, outcome, enterprise controls, deployment and procurement model are supported | Fictional record | 2026-07-22
Method version	`1.0.1`

> **Why this is not a market claim.** The candidate is qualified only for the fictional decision. The record does not rank the market or prove that every buyer sees the same relationship.

Review-required contrast

RegionalFlow US has apparent product fit but Unknown UK/EU serviceability and procurement evidence. The correct state is **REVIEW REQUIRED — INCOMPLETE EVIDENCE** not a reduced score.

6. Limits, related controls and handoff options

COMPETITOR ANALYSIS SCOPE
How to Define the Decision Before Analyzing Competitors

SEO COMPETITOR SET
How Many SEO Competitors Should an Analysis Include?

SEARCH RIVALS VS REAL COMPETITORS
When Publishers, Directories and Marketplaces Are Not Real Competitors

COMPETITOR EVIDENCE
Reliable evidence; confidence; contradictions; observed, inferred and unresolved evidence

COMPETITOR-SET UPDATES
When Should You Update Your Competitor Set?

COMPETITOR CLASSIFICATION
Direct, Indirect, Substitute and Reference Competitors Explained

Portable handoff choices

- Use this PDF for a stable approved-decision record.
- Use the workbook for repeated candidates, evidence ledgering, review queues and reopening history.
- Use the on-page tool for a one-candidate Fast Action result.
- Use the no-JavaScript manual method when browser scripting is unavailable.

Accessible links

How to Qualify Competitors in B2B and SaaS Markets

B2B/SaaS Competitor Qualification Register workbook

Final review Confirm the thirteen output fields, reviewer decision, method version and reopening trigger. Store the approved record without overwriting its predecessor.