

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Researching competitive displacement around switching conditions

QUESTION

What evidence suggests an incumbent could be replaced for a specific workflow?

GUIDE TAKEAWAY

Knowing an incumbent's name does not reveal dissatisfaction or a switching window. Competitive research becomes weak when it relies on generic feature comparisons and assumes every customer wants a replacement.

START HERE

Verify incumbent context.

YOUR SITUATION

Account or cohort

Decision to make

Starting state and exclusions

Evidence sources, dates, and limitations

Unknowns to validate

WORK THROUGH THE GUIDE

1. Verify incumbent context

Evidence or input

Output or decision

Owner and review point

2. Confirm workflow problem

Evidence or input

Output or decision

Owner and review point

3. Compare required outcomes

Evidence or input**Output or decision****Owner and review point**

4. Assess switching conditions

Evidence or input**Output or decision****Owner and review point**

5. Validate evaluation path

Evidence or input**Output or decision****Owner and review point****COMPARE THE OPTIONS**

Incumbent verification

Useful when: Establishing current context

Limitation: Technology traces may be stale

Suggested action: Confirm deployment and entity

Why this fits our situation**Evidence needed before acting**

Workflow comparison

Useful when: Testing a relevant alternative

Limitation: Feature lists miss operating constraints

Suggested action: Use customer requirements

Why this fits our situation**Evidence needed before acting**

Switching-condition brief

Useful when: Qualifying replacement effort

Limitation: Commercial and migration details may be unknown

Suggested action: Plan verification workshop

Why this fits our situation

Evidence needed before acting

Win-loss review

Useful when: Generating useful research questions

Limitation: Reasons may reflect seller bias

Suggested action: Capture buyer evidence and context

Why this fits our situation

Evidence needed before acting

COMMIT TO A BOUNDED NEXT STEP

Chosen action

Responsible owner

Required approval

Success measure and definition

Review date

Continue, revise, or stop criteria

Guide: <https://outselll.com/blogs/competitive-displacement-research/>

Publisher and evidence policy: <https://outselll.com/editorial-policy/>