

# Competitive Opportunity Brief

Illustrative HVAC market research · Harborline Heating & Cooling (fictional)

## FICTIONAL DEMONSTRATION — NOT CLIENT RESULTS

All names, observations and recommendations are illustrative. No performance is implied.

### Executive question

How could an established home-service business identify near-term growth opportunities before investing in new advertising?

### Research approach

- Map up to five competitors across offers, service areas, positioning and observable calls to action.
- Audit publicly accessible business signals with source URLs, capture dates and confidence levels.
- Combine findings with client-provided operational data, subject to scope and permissions.
- Prioritize opportunities by likely relevance, evidence quality, effort, and required validation.

### Illustrative opportunity hypotheses

- Reactivate eligible maintenance customers with seasonal, truthful reminders.
- Audit unsold estimates and diagnose gaps in response timing or CRM follow-up.
- Identify differentiating value propositions that can be substantiated by the business.

### What an actual client report would contain

Source-linked competitor table, dated observations, documented assumptions, opportunity prioritization, specific next-step recommendations and an executive review call.



## Example opportunity scorecard

The figures below are hypothetical illustrations, not projections.

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### Prioritization framework (sample only)

#### Customer reactivation

High potential / medium evidence

Validate eligible lists and booking capacity

#### Estimate follow-up

High potential / medium evidence

Review CRM status, age, and contact rules

#### Market expansion

Uncertain / low evidence

Research demand, serviceability and competition

#### New paid acquisition

Uncertain / low evidence

First model cost per qualified customer

### Evidence and compliance notes

- An actual report distinguishes verified facts from assumptions and hypotheses.
- Data acquisition must respect source restrictions, confidentiality, privacy, and applicable laws.
- No findings should be presented as client outcomes unless documented and approved.