

Why Your Agency Needs a Competition Analysis Template to Win Retainers

I have spent over a decade working with SEO agencies, and one thing I have seen again and again is the gap between what agencies promise in a pitch and what they can actually deliver. A new business proposal looks great on paper, but once the client signs, the real work begins. And the real work often starts with the same question: what are our competitors doing that we are not?

That question is where a solid competition analysis template becomes your best friend. Not a generic spreadsheet you downloaded from a blog, but a living document that forces you to look at every piece of the competitive puzzle. I have used versions of this template for years, and I have watched it turn uncertain pitches into long-term retainers. Let me walk you through why it matters and how to build one that actually works.

The Problem with Ad Hoc Competitor Research

Most agencies treat competitor analysis like a one-off project. They pull a few reports from SEMrush, maybe run some domains through Ahrefs, and call it a day. The result is a messy collection of screenshots and bullet points that nobody looks at again. That approach might win you a project, but it will not win you a retainer. Clients want ongoing insight, not a static PDF.

A [competition analysis template](#) changes that. It gives you a repeatable process. You run the same checks month after month, track changes, and serve your client a clear story about what their competitors are doing. That consistency builds trust. Trust builds retainers.

What a Good Competition Analysis Template Includes

Over the years I have refined my own template until it covers the essentials without bloating. Here is what I include:

- Domain-level organic keyword overlap, pulled from tools like Moz or SpyFu
- Backlink profile comparison, using Majestic or Open Site Explorer for historical data
- Content gap analysis, looking at topics competitors rank for that you do not
- Technical SEO baseline, checked with Screaming Frog or SEOquake
- Traffic and audience estimates, triangulated from SimilarWeb and Google Trends

That list looks simple, but the magic is in how you combine the data. A single metric from Ahrefs means little on its own. When you layer it with what Google Search Console shows

about your client's actual click-through rates, and then overlay Searchmetrics data for ranking volatility, patterns start to emerge. Those patterns are what you present to the client.

Turning Data into a Story

I once worked with an agency that had lost three pitches in a row. They had great case studies and a strong team, but they kept getting beat by a competitor who used Backlinko-style link building strategies. The agency did not know how to articulate why their approach was different. We built a competition analysis template that included a section for "competitor tactics we can replicate" and another for "competitor weaknesses we can exploit." Within two months, they closed a six-figure retainer.

The secret was not the data itself. It was the framing. The template forced them to look at each competitor's backlink sources, content themes, and keyword gaps side by side. They could show the prospect exactly where the market was underserved and how their agency could fill that gap. That kind of specificity is hard to argue with.

Tools That Feed the Template

You do not need a dozen subscriptions to build a useful template. Start with what you already have. Google Analytics and Google Search Console give you first-party data that no third-party tool can match. Pair that with one or two competitive intelligence tools. I lean on SEMrush for organic research and Ahrefs for backlink audits, but SpyFu is excellent for uncovering PPC strategies, and WooRank offers a quick snapshot for smaller clients.

Neil Patel and Brian Dean have both written extensively about competitor analysis, and their frameworks can help you decide which metrics to track. The key is to resist the urge to track everything. A competition analysis template that tries to monitor every possible signal will collapse under its own weight. Pick five to seven metrics that matter to your client's industry and track them consistently.

Pitching Retainers with Confidence

When you walk into a pitch with a completed competition analysis template, you are not selling a service. You are selling a perspective. You can say, "Here is exactly where your competitors are gaining ground, and here is the data-backed plan to take it back." That is a conversation that leads to a retainer, not a project.

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I have seen agencies use the same template to upsell existing clients. After six months of monthly reporting, the client sees the value and asks for more. You can expand the template to include social media signals from SimilarWeb, brand mention tracking, or even local SEO metrics from Google Trends. The template grows with the relationship.

Common Mistakes to Avoid

Let me save you some pain. The biggest mistake I see is treating competitor analysis as a one-time event. It is not. Set up regular intervals, monthly or quarterly, and rerun your competition analysis template. The second mistake is ignoring your own data. Google Search Console will tell you exactly which queries send traffic to your client's site. Cross-reference that with what Ahrefs says competitors rank for. The overlap and gaps are gold.

Another trap is over-relying on PageRank or domain authority scores. Those metrics are useful directional signals, but they do not tell you why a competitor's page ranks. Dig into the content itself. Use Open Site Explorer to see which pages earn the most links, then analyze why. That qualitative layer is what separates a good template from a great one.

Building the Template in Practice

Start with a simple spreadsheet. Create columns for domain, primary keywords, estimated organic traffic from SimilarWeb or WooRank, top pages from Screaming Frog or Google Analytics, and backlink sources from Majestic or Moz. Then add a column for notes, where you record anything unusual you find. Over time, that notes column becomes your most valuable asset. It captures the context that raw numbers miss.

I also keep a section for competitor content performance. If a competitor published a guide that went viral, I note the topic, the angle, and the distribution channels. Neil Patel's old posts on content promotion are still relevant here. Brian Dean's skyscraper technique works because it is built on competitor analysis. Your template should help you spot those opportunities.

One more thing: share the template with your client. Let them see the raw data. It builds transparency and shows you are doing the work. I have had clients start sending me competitor links they noticed, which made my analysis even better. That kind of collaboration is what turns a vendor into a partner.

Final Thoughts

A competition analysis template is not a magic bullet. It is a discipline. It forces you to look beyond your own metrics and understand the playing field. Agencies that master this discipline win more pitches, keep clients longer, and charge more for their services. The tools are all there: SEMrush, Ahrefs, Moz, SpyFu, SimilarWeb, Majestic, Screaming Frog, and the rest. What matters is how you weave them into a repeatable process.

Start building your template today. Even a rough version will give you better insights than guessing. And the next time a prospect asks how you will outperform their current agency, you will have the answer ready, backed by data they can see and trust.