

Spotlight - AI Research (Contacts, Competitors, Industry)

Preparation

1. Import the attached SampleTB (based on the UK Sample, including a real existing company and setup for AI including API keys).

Benefits:

- **Saves time** by instantly generating company, industry, and competitor insights — no manual research or external tools needed.
- **Supports smarter decision-making** with real-time, reliable data pulled from trusted sources.
- **Improves sales preparation** with detailed profiles, financial summaries, and key decision-maker information.
- **Provides strategic recommendations** tailored to each contact's needs and market context.
- **Identifies new leads** and market opportunities based on competitor analysis and industry trends.
- **Fully integrated in Standard ERP** — no extra systems or integrations required.

"I will show you one of the newest features in **Standard ERP — AI-powered Research reports**, fully integrated into the system. These tools allow us to instantly gather **critical information** about:

- A **specific company or contact**,
- The **industry they operate in**, and
- Their **competitors and potential leads for you**.

The goal is simple: **save time**, give your team **better information about the contact**, and help you make **smarter decisions** (like leads prioritization) — all without leaving Standard ERP.

ACTION: Open the Contacts Register >> Select the Contact Freefoam Ltd.
Open the Operations menu and keep on screen.

To access these tools, just open a Contact record and go to the Operations menu. Here you'll see three options:

ACTION: Shortly Highlight each option in the Operations menu without clicking on them.

1. Research Contact,
2. Research Industry, and
3. Research Competitors.

Each one generates a different type of report — and they all run in real-time, pulling live data from reliable sources across the internet.

ACTION: Select 'Research Contact'. A timer will count. Speak the following sentences while the report is calculating.
In a live system this can take even 1 minute.
Show the report contents once it pops up on screen.

This feature creates a **detailed profile of the organization** you're dealing with. Here's what it provides:

- **Basic profile:** name, location, size, and a short company history.
- **Financial overview:** high-level financial health, with the latest available numbers and reporting dates.
- **Key decision-makers:** the people you need to engage with and why they matter for ERP or CRM projects.
- **Strategic recommendations:** suggestions for how **HansaWorld Standard ERP** can directly address their needs (HW is us, but this will provide strategic recommendations for our customers using these features).

This saves sales teams hours of manual research and helps them walk into meetings fully prepared with facts and actionable insights.

ACTION: Do not close the report, but go back to Contact >> Select 'Research Industry'. Speak the following sentences while the report is calculating. (up to 1 Minute). Show the report contents once it pops up on screen.

Next, let's look at the **Research Industry**.

This report steps back and analyzes the **market as a whole**.

You'll see:

- **Industry vertical and description**,
- **Market trends** and growth indicators,
- **Technology trends** like sustainability reporting or automation tools,
- **Challenges companies face**, such as compliance or supply chain issues, and
- **Opportunities for digital transformation**.

This helps you **position our solution** (our solution is relevant for us, but this will provide strategic recommendations for our customers using these features, for the product and services they are offering) correctly and identify areas where you can add value.

For example, if there's growing regulatory pressure, you can highlight SERP's compliance and traceability features.

ACTION: Do not close the report, but go back to Contact >> Select 'Research Competitors'. Speak the following sentences while the report is calculating. (up to 1 Minute). Show the report contents once it pops up on screen.

Finally, we have **Research Competitors**. This feature identifies **up to five competitors** in the same region as your target contact.

For each competitor, you'll get:

- **A basic profile** like location, website, and positioning.
- **Strengths and weaknesses**, summarized for easy comparison.
- **Recent news or updates** like expansions, acquisitions, or certifications.

At the end, you get a **summary of the competitive landscape**, showing how intense the rivalry is and what trends are shaping the market.

This isn't just for understanding competitors — it can also help you **spot new leads** (similar companies to an existing lead or customer, or supplier).

For example, if a competitor is struggling with sustainability compliance, that's an opening to position SERP as a solution.

ACTION: Bring forward all 3 reports once more and show them side-by-side.

These three reports — **Contact, Industry, and Competitors** — work together to give you a **complete picture**:

- Who your prospect is,
- The market they operate in, and
- Who they're competing against.

And all of it is **automatically generated** inside Standard ERP, in just a few clicks. No external tools, no manual Google searches, no wasted time.

For our partners (or channel managers), this means:

- **Faster sales cycles**, since you always have the right information at hand.
- **Higher win rates**, because your proposals are based on accurate data and tailored to the customers/lead's situation.
- **Localized market knowledge**, with competitor data focused on the same region as the target company.
- And most importantly, it's all built into SERP — **no extra integrations or separate systems needed**.

In short, Research with AI turns Standard ERP into more than just an ERP system — it becomes a **strategic intelligence tool**.

Whether you're exploring a new market, preparing for a big pitch, or looking to grow an account, you now have **actionable insights at your fingertips**.

Let's finish by running a final example live so you can see just how easy and fast this process is.