



BATTLECARD PDF TECHNICAL TIPS GUIDE

Tips for download, versioning, use and distribution

1. Download & Master File Setup (Do This First)

Why it matters

If you overwrite fields or work directly in the template, you permanently lose built-in guidance and examples.

How to do it

- ▶ **Download both PDFs:**
 - Battlecard Template → your working structure
 - Battlecard Example → reference only
- ▶ **Immediately create a master copy:**
 - Rename the template to something like: Battlecard_Template_MASTER_DO_NOT_EDIT.pdf
- ▶ **Never edit the master file**
 - All battlecards should be created from duplicated copies

Example File Structure

/Battlecards/00_MasterBattlecard_Template_MASTER_DO_NOT_EDIT.pdf /01_Working Battlecard_EvilCompetitor_v1.0.pdf

2. Required Software (Minimum Viable Setup)

Why it matters

Most browser PDF viewers cannot:

- ▶ Add images
- ▶ Properly save form fields
- ▶ Preserve formatting across devices

What you need

- ▶ **Adobe Acrobat Reader (free) — minimum requirement**
 - Download: <https://get.adobe.com/reader/>
- ▶ **Optional (not required):**
 - Adobe Acrobat Pro (for advanced editing or flattening)

Key rule

If you need to upload logos, headshots, or screenshots, you must use Adobe Acrobat Reader, Acrobat Pro or similar product.

3. How to Fill Out Fields Without Losing Instructions

Why it matters

The template includes instructional text inside fields. If you overwrite it, it's gone forever in that file.

Correct workflow

- ▶ **Duplicate the template**
- ▶ **In each field:**
 - Copy the instructional text · Paste it into a separate doc (or delete after reading)
 - Then replace it with your final copy

Best practice

- ▶ Fill in one full battlecard first
- ▶ Use it as a pattern for the rest

What NOT to do

- ▶ Don't "SaveAs" over the original template
- ▶ Don't assume you can "undo" after closing the file

4. Image Upload Tips (Logos, Proof, Screenshots)

Why it matters

Broken or missing images are the #1 reason battlecards fail on mobile.

What NOT to do

- ▶ Use PNG or JPG
- ▶ Recommended logo size: ~300–600px wide
- ▶ Insert images directly into the PDF fields (not floating)

Check before sharing

- ▶ **Open the PDF on:**
 - Desktop
 - Mobile phone
- ▶ **Confirm images scale correctly**

5. Versioning Rules (Simple, Enforced, Scalable)

Why it matters

Sales teams hate outdated battlecards and will stop using them if trust breaks, often just once.

Recommended version format

- ▶ Battlecard_[CompetitorName]_v1.0.pdf
- ▶ Battlecard_[CompetitorName]_v1.1.pdf (minor copy update)
- ▶ Battlecard_[CompetitorName]_v2.0.pdf (strategy change)

Rules

- ▶ Never overwrite a previous version
- ▶ Only the latest version goes into the CRM or content library
- ▶ Archive older versions in a separate folder

6. CRM Linking Workflow (Critical for Adoption)

Why it matters

Battlecards only get used when they're one click away inside the deal flow.

Recommended setup

- ▶ **Upload PDFs to:**
 - CRM file manager or
 - Central content system (Google Drive, Notion, Highspot, etc.)
- ▶ **Create:**
 - Custom CRM field - Primary Competitor
 - URL field - Battlecard Link

Usage

- ▶ Sales selects competitor → clicks link → opens PDF instantly
- ▶ No searching. No attachments. No confusion.

7. Content Library & Mobile Access

Why it matters

Most reps will open battlecards:

- ▶ Between calls
- ▶ On phones
- ▶ While multitasking

Best practices

- ▶ **Store PDFs in:**
 - Google Drive
 - Notion
 - Sales enablement tool
- ▶ **Ensure:**
 - View permissions for sales
 - Offline access enabled where possible
- ▶ **Test on:**
 - iPhone
 - Android

Naming convention

- ▶ Competitor – Evil Competitor Company
- ▶ Competitor – 2nd Evil Competitor Company

8. Distribution & Sharing Rules

Internal use

- ▶ Share links, not downloads
- ▶ One "source of truth" location

External sharing

- ▶ Only if explicitly approved
- ▶ Consider watermarking or flattening if needed

Do not

- ▶ Email static attachments that will go stale
- ▶ Let reps save personal copies without updates

Quick Checklist (TL;DR)

- Keep a master template untouched
- Use Adobe Acrobat Reader at minimum
- Duplicate before editing
- Never overwrite instructional text blindly
- Version every change
- Link PDFs inside the CRM
- Test on mobile before rollout