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The Positioning Workbook

A step-by-step workbook that takes a team from competitive alternatives to a positioning statement, a one-line value proposition and message tests. Includes a fillable Word workbook and a worked hypothetical example.

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This workbook is for founders, product leaders, product marketers and sales leaders who need to agree on what their product is, who it is for and why it wins. It is most useful when the symptoms are familiar: sales calls that take twenty minutes to explain the product, a homepage that could describe three competitors, a pipeline full of prospects who were never a good fit, or a team where each person describes the product differently.

The outcome is a positioning statement the whole team has built and agreed, a one-line value proposition derived from it, and a set of message tests that tell you whether the words work outside the room. The download includes the PDF guide and the fillable Word workbook, which walks a team through each step with prompts and tables to complete together.

How to use this

1. Book two working sessions of about two hours each, a few days apart. Positioning done in one sitting tends to reflect whoever spoke last.
2. Invite a small group: the founder or CEO, product, marketing, sales and someone who works directly with customers in support or success. Five or six people is enough.
3. Before the first session, pull a list of your best customers: the ones who bought quickly, use the product well, stay and refer others. Each person should bring what they know about why those customers chose you.
4. Work through the Word workbook in order. The sequence matters, because each step depends on the one before it.
5. Draft the statement and value proposition at the end of the second session, then run the message tests over the following two weeks with real buyers.
6. Revisit the workbook whenever the product, the market or your best customers change in a meaningful way.

The method

The sequence below follows the approach set out by April Dunford in *Obviously Awesome*, adapted for teams that need a written statement and testable messages at the end. Its central idea is that positioning starts from what customers would do if you did not exist, not from the product's feature list.

1. Competitive alternatives

List what your best customers would use if your product disappeared tomorrow. Include the honest answers: spreadsheets, an intern, a generic tool, an agency, doing nothing, or a direct competitor. Group them into three to five categories. This list defines the frame of reference your buyers already have, and every claim you make will be judged against it.

2. Unique attributes

For each alternative, list what you have or do that it does not. These are capabilities, approaches, data, expertise or business model differences, not adjectives. "Easy to use" is not an attribute; "set up in a single call with no IT involvement" is. Keep only attributes you can prove with a demo, a reference or a number.

3. Value

Translate each attribute into the value it creates for the customer, and then group the values into two or three themes. Value answers "so what?" in terms the customer cares about: time saved, risk avoided, revenue gained, decisions made faster. Each value theme should be backed by proof you can show, such as a customer quote, a measured result from your own data or a demonstration.

4. Target segment

Describe the customers who care most about that value. Go beyond firmographics to the characteristics that make someone a great fit: the situation they are in, the trigger that makes them look for a solution, the volume or complexity they deal with. A good segment description helps sales disqualify bad-fit prospects quickly, which is as valuable as helping them find good ones.

5. Market category

Choose the frame of reference that makes your value obvious to the target segment. The category sets assumptions about what you do, who you compete with and what you should cost. You can position within an existing category, take a sub-segment of one ("X for Y"), or, rarely and expensively, create a new one. Pick the category in which your strengths are clearest and your weaknesses matter least.

6. The statement

Only now write the statement. By this point the content exists; the statement assembles it.

The statement template

> For **[target segment]** who **[situation or trigger]**, **[product]** is a **[market category]** that **[primary value]**. Unlike **[main competitive alternative]**, we **[unique attribute, with proof]**.

From the statement, derive a one-line value proposition: a single sentence a buyer would understand without context. It usually combines the primary value with the category or the segment, for example "[Primary value] for [segment]". The statement is internal and guides every message; the value proposition is external and goes on the homepage, the deck and the first line of an outreach email.

Three tests for the statement

The swap test. Replace your product's name with a competitor's. If the statement is still true, it describes the category, not your position. Go back to unique attributes and push for something only you can claim.

The recognition test. Read the statement to three of your best customers. Ask whether it describes why they bought and whether they would phrase it differently. If they say "that's nice but it's not why we chose you", your positioning reflects what you wish were true.

The disqualification test. Give the statement to a salesperson and ask them to name three prospects in the current pipeline who do not fit. If they cannot, the segment is too broad to guide decisions.

Message tests for the value proposition

Statements stay inside the company. Messages meet buyers, so test them with buyers. The workbook includes a table for recording each test, the audience, the result and the change you made.

- **Five-second test.** Show the value proposition to people in the target segment for five seconds, then ask what the product does and who it is for. If more than a few get it wrong, rewrite.
- **Pick-one test.** Show two or three versions of the value proposition and ask which one they would forward to a colleague and why. The reasons are more useful than the vote.
- **Outreach test.** Use two versions as the first line of otherwise identical outreach to similar prospects and compare reply rates. Small samples give direction, not proof, so look for large differences.
- **Sales call test.** Ask a salesperson to open five calls with the new value proposition and note where prospects lean in and where they ask "what do you mean by that?"

Worked example (hypothetical)

The following example describes an imagined product. The company, alternatives and results are illustrative only.

The product uses AI to match incoming bank transfers to open invoices for B2B companies. Its team had been calling it "an AI finance assistant", which buyers found vague and which placed it next to dozens of general tools.

Competitive alternatives. The team's best customers said they would otherwise use an accounts receivable clerk matching payments by hand in spreadsheets, the rule-based matching built into their ERP, an outsourced bookkeeping firm, or a broad accounts receivable automation suite.

Unique attributes. Against these alternatives, the team identified three attributes they could prove: it matches one transfer to many invoices, and partial payments, using remittance details pulled from customer emails and PDFs; it learns from each correction a clerk makes, so match rates improve per customer; and every match shows the evidence behind it, which auditors can review.

Value. These attributes grouped into two themes: cash is applied the same day instead of days later, which shortens month-end close and makes customer balances accurate for collections; and the

finance team can trust and audit automated matches, which removes the main objection to automation in finance.

Target segment. B2B companies that receive most payments by bank transfer, process roughly 500 to 5,000 incoming payments a month, have many customers who pay several invoices in a single transfer, and have a finance team of 3 to 15 people. The trigger is usually a growing backlog of unapplied cash or a new finance lead who wants a faster close.

Market category. The team chose "cash application automation" over "AI finance assistant". It is a category finance leaders already recognise, it sets the frame against manual matching and ERP rules, where the product is strongest, and it avoids comparison with full suites, where it is weakest.

Positioning statement.

> For mid-market B2B finance teams who match hundreds of bank transfers to invoices every week, the product is a cash application automation tool that applies incoming payments the same day with a match trail auditors can review. Unlike ERP rule-based matching, it handles bulk and partial payments by reading remittance details from emails and attachments, and it improves with every correction.

One-line value proposition. "Same-day cash application for B2B finance teams, with every match explained."

Message tests. In this hypothetical, the five-second test showed that "cash application" was clear to finance leads but not to founders at smaller companies, which confirmed the segment choice rather than prompting a rewrite. The pick-one test favoured "every match explained" over "AI-powered", because buyers said it answered their first objection.

Common mistakes

- **Starting with the statement.** Filling in the template first produces generic words. The statement should be the last thing you write.
- **Listing features as attributes.** An attribute only counts if it is different from the alternatives and you can prove it.
- **Ignoring the non-obvious alternatives.** Spreadsheets, people and doing nothing are often the real competitors, especially for AI products entering manual workflows.
- **Defining the segment by size alone.** Company size rarely explains why someone buys. Situation, volume and trigger usually do.
- **Choosing a category for how it sounds.** A new or trendy category name may feel distinctive, but if buyers do not recognise it, you will spend your budget explaining it.
- **Leading with the technology.** For AI products, "AI-powered" describes how, not why. Buyers want to know what changes for them and whether they can trust it.
- **Testing only inside the company.** Internal agreement is necessary but tells you little about whether buyers understand the message.

When not to use this

Do not run this workbook before you have a handful of customers who chose you, use the product and would be disappointed to lose it. Without them, the alternatives and value steps rest on guesswork, and a customer discovery sprint is the better first step. It is also the wrong tool for a campaign tagline or a single launch message; those sit downstream of positioning and should be written from it. And if the team disagrees about which customers are the best fit, settle that question with data before you start, because the rest of the workbook depends on it.

Editable template: Positioning workbook (Word), available at ratomir.com/resources/positioning-statement-workbook

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