

# April Dunford messaging document template.

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## Introduction:

### What is this and why do I want to use it?

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Every time you create a marketing campaign or create a new piece of sales collateral, you will need to write some copy describing what you do and the value you deliver. Companies that don't have a messaging document encounter the following problems:

1. They waste time in recreating messages over and over again for every new tactic.
2. When recreating messages, the messages will often shift slightly (or more than slightly), resulting in inconsistent and confusing messaging in marketing and sales materials.
3. New employees often do not understand the fundamental positioning that gives context to the marketing and sales messaging, resulting in further shifts in messaging over time.
4. Executives waste time reviewing and approving copy for campaigns and content when there is no boilerplate approved messaging for employees to pull from. This slows down everyone on the team.

The messaging document is a way to keep a record of the current company thinking on positioning and target markets, as well as a set of boilerplate messages that have been edited, massaged and approved, that can be used and reused to keep your messaging consistent. There are other ways to track this of course (in a shared folder for example). I prefer to have a document that lays it out in order and links to assets that can't live in a document format. The messaging document becomes:

- The consistent record of the current approved company Positioning that provides context for all marketing and sales content creation.
- A set of all approved marketing boilerplate messages that can be used without further review and approval.
- A set of approved marketing boilerplate messages that can be used as the foundation for any specialized one-off marketing or sales messages.

Assumptions: This template assumes that the company has only a single product and that the company and product positioning are equivalent. If you have read my [positioning book, Obviously Awesome](#), you can read more about positioning a company vs a product starting on Page 71. Lastly, like everything I do, this template is built with a B2B start up in mind. It may be helpful for B2C companies, but I don't work with those so, consider yourselves warned.

I created this template for my own use as a VP Marketing and have iterated and improved on it over the past decade or so. I hope you find it helpful. Compliments and gentle constructive feedback can be sent to [april@aprildunford.com](mailto:april@aprildunford.com).

## Section one: Positioning

Positioning is the underpinning of your messaging. Everything in the Messaging Document must align with this Positioning. If you have never done a Positioning exercise you should do that first.

I wrote a book outlining a methodology for doing positioning - click the link to find out more about my positioning book, [Obviously Awesome](#). If you have a completed Positioning Canvas from that exercise - it will go here. Note: The value messages captured here SHOULD NOT be used - the approved message boilerplate is captured in Section 2. Positioning is provided here for context only.

### Positioning canvas

#### Market category frame of reference

*The macro market category that you compete in:*

#### Competitive Alternatives

*What customers would use as an alternative to you (including solutions, hiring people, Excel, or do nothing):*

#### Key unique attributes

*Features, capabilities, relationships, expertise that only you have:*

#### Enabled value & proof

*The value you deliver for customers & why they should believe you:*

#### Customer segments

*Specific groups of customers that care about your value & how you recognize them:*

## Section two: Boilerplate messaging

The goal here is to get approved wording that you can use when you are creating marketing or sales material. This will help you stay consistent in your messages and make sure you aren't re-creating this text every time you create a new campaign.

### **The One-Liner**

*This is a one or two sentence description of what you do. It should focus on what you are and the greatest benefit you deliver. Bonus points for giving a hint about who you are for.*

### **The One-Paragraph Elevator Pitch**

*A one paragraph description of what you are, the top one or two value points you deliver and some indication of what your target market is. Bonus points for indicating some proof you can deliver the value you say you can.*

### **The 100 Word Description**

*This is usually one to two paragraphs. Here you have room to include what you are, your top 2 to 3 value points, an indication of proof you can deliver that value, and something that indicates what your target market is.*

## **The 500 Word Description**

*This is usually one to 4 to 5 paragraphs. Here you have room to include what you are, a longer description of your top 3 to 4 value points, proof you can deliver that value, and something that indicates what your target market is. In this longer form you can also include additional general proof of market position and/or traction which would include names of customers, brag-worthy statistics (number of users, usage metrics, etc but only if they are clearly exceptional and understandable), awards won, etc.*

## Value points boilerplate

This is approved wording for your top 3-5 points of value to be used as a reference for marketing and sales material. You will repeat this table for each buyer persona in each target segment. For example, if you are targeting 2 markets (i.e. retail and banking) and each of those markets has 2 buyers you are targeting (for example, VP sales, VP marketing) then you will fill out 4 of these.

**Note on Target Segments:** *If you are trying to actively market to more than 3 segments and you are less than \$10M annual revenue I think you have too many. If you are a startup with less than \$1M annual revenue, I don't believe you have the resources to market to more than 1 segment. You may sell to others if they come to you but you don't need boilerplate for those. (Sure there are exceptions and this is just my very biased yet heavily experienced opinion which you paid \$0 for but you know, seriously, you have too many).*

**Note on Buyer Personas:** *As in the above, you may be trying to target too many of these. In my opinion, you do not need boilerplate messaging for every persona that may have a minor influence on a purchase decision if you aren't actively marketing or selling to all of them. I recommend you read [The Challenger Customer](#) to get smarter on this. In my experience, most early-stage startups should only need one or two tables, particularly if you are not doing full-blown Account-Based Marketing.*

**Note on Value Points, Features, Benefits:** *I have listed Value Themes (you can think of them as your value statements) first, followed by features, benefits, and proof. That ordering might feel awkward to you when you are building the template but it's important to list them that way. Many features will support a common set of benefits which in turn will map to a Value theme. You determine them in that order. However, on this chart, I list the Value first because Value will form the foundation of your messaging and features, benefits, and proof are merely supporting facts around that value. You may have a long list of features that support a given Value theme, and that's OK. That long list of features may map to a long-ish list of benefits as well. However, in general, these benefits will map to a small number of Value themes (in my experience less than 4). The point here is not to message every possible bit of value your solution provides, we want to focus on the main ones only. Customers won't choose you for a million reasons, they generally choose you for a couple of reasons because they simply can't pay attention and retain much more than that.*

*If you have worked through a [positioning exercise](#) earlier (you should, you know!), then you will have worked through an overall Features to Value mapping exercise that would apply in the general case across segments and personas. In this part of the messaging document, you are looking to capture how those value statements change across different customer segments and personas, if at all. You might find that the value statements don't change much between segments and personas and if this is the case, I find it very helpful to collapse them to keep things simple. Fight the urge to over-complicate your messaging structure. If your VP Marketing persona ends up with the same value points as your VP Sales persona, put them together into a "VP Marketing/Sales" table and leave it at that.*

*Lastly, if you have worked through my Sales Story template, you will see things here that map to that - in particular, the problem space, the current solutions and the shortcomings of the current solutions. You can find the Sales Story template (and the rest of my templates at [aprildunford.com](http://aprildunford.com) under "Templates"*

## Value point table

### Target Segment 1

The market segment you are actively marketing to. List relevant characteristics, environment, behaviors that make them ideal for your solution. (example: online retailers ABCCommerce that do more than \$100K in revenue).

### Buyer Persona 1

Characteristics of the person you are targeting in your marketing/sales efforts. This is typically the person who makes the decision/recommendation to purchase your solution. List their title and other relevant characteristics. (The CEO, the IT director, or the head of e-Commerce).

### Problem Space

The definition of the problem area where your solution operates. What is the problem? What is the business impact of that problem? (example: You want to be able to build a mailing list of customers so you can market to them but your email marketing platform doesn't integrate directly with ABCCommerce).

### Current Solutions

For this target segment, and this persona, what is currently being done to solve this problem? This could be manual processes, general-purpose tools like Word or Excel, or another solution. (Example: You are manually copying and pasting email addresses into your email marketing platform).

### Shortcomings of Current Solutions

What does this persona perceive to be the shortcomings of the current solutions? What annoys them or makes the current solution less than ideal? (Manually copying email addresses is error-prone and time consuming. It also means I can't segment my mailing list by purchase the way I could if ABCCommerce was directly integrated into my email platform).

### Value Theme 1

What is the impact of your product on this persona? (example: Grow revenue by building long-term loyalty with your customers).

### Features

The features that enable this value (example: Direct integration with ABCCommerce, customer profiles connected to email addresses, machine learning produces accurate preference predictions).

### Benefits

The benefits derived from the features (example: Retailers can make tailored offers to customer sub-segments, retailers can make personalized offers based on buyer past purchases).

### Proof

Evidence that you can provide this value (example: Customer ABC saw a 40% increase in repeat purchases).

### Value Theme 2

### Features

### Benefits

### Proof

### Value Theme 3

### Features

### Benefits

### Proof

## Section three: Competitive messaging

I don't always include this in a messaging document but I do when we are in a competitive market where comparisons between my product and a specific direct competitor come up frequently. I find this helpful for sales materials in particular. The goal here is to have approved wording that can be used outside of the walls of the company. In general, I avoid direct competitor references. See the examples in the table.

### Competitive messaging

Competitor Claim	Our response
<p><b>Claim 1</b> Example1: Company ABC has the best performing doo dad for large companies</p>	<p><b>Response</b> Example response: Lovely Corp measures performance using the lovely scale which measures love plus understanding. For customers that rely on love and understanding, Lovely Corp provides better performance than any other offering on the market</p>
<p><b>Claim 2</b> Example 2: ABC is the market leader in doo dads with more customers than any other doo dad provider in the world.</p>	<p><b>Response</b> Example response: Lovely Corp specially designed our doo dads for small retailers who prefer doo dads with more love and a higher level of understanding than the more general-purpose doo dads on the market. Lovely Corp had over 5,000 small retailers that love our doo dads.</p>
<p><b>Claim 3</b></p>	<p><b>Response</b></p>
<p><b>Claim 4</b></p>	<p><b>Response</b></p>



## Section four: Approved customer assets

The purpose of this section is to serve as a collection of approved customer-related assets that you can use in campaigns, content or any other marketing and sales purpose. The goal here is to have a record of everything that has been through final approvals for customers to make sure you are using them consistently.

<b>Customer Name</b>	<b>Link to Video Assets</b>	<b>Link to Case Studies</b> <i>You might have long, short or one-slide versions of these.</i>	<b>Approved Quotes</b> <i>You might have quotes from press releases or case studies. This section is where you capture them separately so you can use them in other places.</i>	<b>Approved Visual Assets</b> <i>This might include photos of people or their offices or screen shots of their solution that you have approval to use.</i>
<b>Customer 1</b>	<b>Video 1</b>	<b>Case Study 1</b>	<b>Quote 1</b>	<b>Visual 1</b>
<b>Customer 2</b>	<b>Video 2</b>	<b>Case Study 2</b>	<b>Quote 2</b>	<b>Visual 2</b>
<b>Customer 3</b>	<b>Video 3</b>	<b>Case Study 3</b>	<b>Quote 3</b>	<b>Visual 3</b>
<b>Customer 4</b>	<b>Video 4</b>	<b>Case Study 4</b>	<b>Quote 4</b>	<b>Visual 4</b>

## Section five: Brag points

The purpose of this section is to capture general brag-worthy facts about your company. Some of these might be used in Value points sections as “Proof” but some will be general proof that you are a successful company with traction in the market. The goal here is to capture the approved wording so that it can be used for any marketing/sales purpose in a consistent way.

### Brag points

<b>Type of Brag</b> <i>This could be awards, usage statistics, independent reviews, etc.</i>	<b>Date</b>	<b>Details</b> <i>Description of who, what, why of the brag.</i>	<b>Approved Brag Wording</b>
<b>Brag 1</b> <i>Example 1: Winner, doo dad innovator of the year</i>	<b>Date 1</b>	<b>Details 1</b> <i>Example: Award presented by the doo dad users association for any doo dad that displays a lot of innovation</i>	<b>Wording 1</b> <i>Example: Lovely Corp was awarded “Doo Dad Innovator of the Year” in recognition of our breakthrough love and understanding technology</i>
<b>Brag 2</b>	<b>Date 2</b>	<b>Details 2</b>	<b>Wording 2</b>
<b>Brag 3</b>	<b>Date 3</b>	<b>Details 3</b>	<b>Wording 3</b>
<b>Brag 4</b>	<b>Date 4</b>	<b>Details 4</b>	<b>Wording 4</b>

## Section six: Spokesperson bios & links

If you have a press kit you can include links to the relevant pieces, otherwise, the Messaging Document is a handy place to keep this. If you have a spokesperson that regularly speaks at conferences, you can keep their approved talk descriptions here as well. Complete this table for each spokesperson.

### Spokesperson bios

<b>Name:</b>	<b>Title:</b>	<b>High-resolution photo for print:</b>  <b>Low-resolution photo for the web:</b>
<b>Short Bio (2 to 3 short sentences)</b>		
<b>Medium Bio (100 words)</b>		
<b>Long Bio (200 words)</b>		
<b>Talk Description 1</b>		
<b>Talk Description 2</b>		

## Section six: Links to approved visual assets

Most companies have a folder somewhere for approved brand assets (logos, etc) but I find it really helpful for the team to also have access to a list of “approved for use” screenshots or other visual elements (diagrams, illustrations, photos, etc.). When the elements are updated, this document will reflect what the approved versions are. If you are going to all the trouble to tracking everything else in this document, you might as well add these in too.

### Approved visual assets

<b>Visual Asset Description</b> <i>These can range from your brand assets (logos , etc) to screenshots, photos, diagrams, illustrations, etc.</i>	<b>Link to Approved Version of the Asset</b>	<b>Notes for Use</b> <i>If there are restrictions on when the asset can be used, you will want to note it here.</i>