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The Complete Obviously Awesome + Sales Pitch Workbook



How to Use This Workbook

Thank you so much for downloading this workbook. Here is some advice on how to use it.

This workbook is meant to be used as a companion to the books – it is designed to supplement the materials in the two books, *Obviously Awesome* (for positioning) and *Sales Pitch* (for building a sales pitch). Descriptions and instruction in this workbook are minimal and in general, I will point back to the relevant material in the books. **If you have questions about this workbook, I can almost guarantee they are answered in the books.**

Don't neglect the process! Filling in this workbook on your own might be a somewhat interesting intellectual exercise but it is no substitute for working through the processes outlined in the books with a team.

It's OK to Mess Around With the Methods – the workbook is meant as a resource to help guide your thinking. The workbook and these books it is based on are not meant to be followed in an excessively dogmatic fashion. It's perfectly OK if you want to adjust these methods to better fit your situation – in fact, I would encourage you to!

Please do not distribute this workbook – I like to make updates and it's hard to keep things current if folks are distributing it independently. You do not have permission to copy this workbook and claim it as your own (I can't believe I have to spell that out but here we are!).

If you want to thank me for making this workbook free to use, I would appreciate it very much if you **left a book review for my books on Amazon**. It only takes a minute and it would mean a lot to me.

April Dunford



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Assumptions

Before we begin I want to cover an important set of assumptions that you should be aware of before you try to use these templates.

The method was built with a specific type of company and product in mind –

That doesn't mean that it can't work for other types of companies and products, it just means that it may not or it may work differently. The methods and templates reflect my own background as a product and marketing professional. Specifically it assumes that the product is:

- **B2B** – it may work with consumer products (particularly those that are a highly considered purchase) but it was not built specifically for those types of products.
- **Currently In-Market with a Certain Amount of Traction** – The methods assume that the product is in-market and has had enough traction that you understand the patterns around who loves you and why. Pre-launch you can use the positioning methodology to craft a positioning thesis (see page 68-69 in Obviously Awesome).
- **Sold Using a Sales Team at Some Stage** – I generally do not work with teams that have a completely zero-touch go to market motion, mainly because those teams will not understand enough about what alternatives customers truly consider, the decision-making process and stakeholders unless they do formal research to go get that data. If you have that, the positioning method will work for you and the sales pitch method will help you craft a story around it. If you have not done that research, what you will end up with will be highly theoretical and likely incorrect.

Positioning Components

01



Competitive Alternatives

If you didn't exist, what would your customers use?

02



Distinct Attributes

What features or capabilities do you have that alternatives do not?

03



Differentiated Value

What value do the attributes enable for customers?

04



Customers that Care

Who cares a lot about the value?

05



Market you Win

What context makes the value obvious to your target segments?

- 1. Competitive Alternatives** – if you didn't exist, what would a customer use instead? This includes status quo solution like “manual processes.” Only include alternatives that end up on a customer short list, not every alternative that theoretically could compete with you.
- 2. Distinct Attributes (or Capabilities)** – these are the features of your product and capabilities of your company that the alternatives do not have. It's OK if not all capabilities are distinct from every alternative – list them all.
- 3. Differentiated Value** – the business value that your product or company can deliver that the others cannot. There should be 1-4 themes.
- 4. Best-Fit Customers** – the characteristics of a target account that makes them really care a lot about the value that only you can deliver.
- 5. Market Category** – the context you position your product or company in. The starting point for prospects that are trying to figure out what you do.

Positioning Process Reference Sheet

The book Obviously Awesome contains a highly detailed look at each of the steps in the positioning process. This list is intended as a reference. Page numbers for each step in the book are included.

- 1. Focus on good customers, exclude bad ones** – Focus on the customers that love your product and are good for your business. Deliberately exclude customers who, although they might pay you a lot, are ultimately a bad fit for your solution. Don't worry about why they are or are not a good fit – just understand which customers we should have in mind while doing the exercise.
(Page 65)
- 2. Form a positioning team** – the team should include marketing, sales, product, customer success, the founder/CEO and potentially others.
(Page 77)
- 3. Align your positioning vocabulary and let go of your positioning baggage** – accept and acknowledge that the positioning might be different than it was previously.
(Page 83)
- 4. List your true competitive alternatives and group them into “approaches”** – including the status quo in accounts and competitors that land on a short list against you. Do not include “theoretical competitors” – companies that could compete with you but never make a customer's short list. Group the competitors by their approach to the problem.
(Page 89)
- 5. List your distinct capabilities** – this includes features of the product as well as distinct capabilities of the company that your competitors do not have. It's OK if a capability isn't differentiated against every competitor.
(Page 97)
- 6. Map capabilities to 1-4 value themes** – for each capability ask “So what? Why does a customer care about this feature? What does this capability enable for a customer's business?” Group Value into 1-4 buckets or “themes.”
(Page 105)
- 7. Determine the characteristics of an account that cares a lot** – looking at the value themes ask yourself “What are the characteristics of a target account that makes them care a lot about the value that only we can deliver?”
(Page 113)
- 8. Determine the best market category** – what context should we position the product in such that our value makes sense to our target best-fit accounts?
(Page 121)
- 9. Layer on a trend** – when and if it makes sense to.
(Page 155)
- 10. Capture the positioning so it can be shared.**
(Page 165)

The Positioning Canvas

Product or Company:

Date Completed:

Competitive Alternative Approaches

Approach #1

Approach #2

Approach #3

Distinct Capabilities

Differentiated Value

Value Theme #1

Supporting capability 1
Supporting capability 2

Value Theme #2

Supporting capability 1
Supporting capability 2

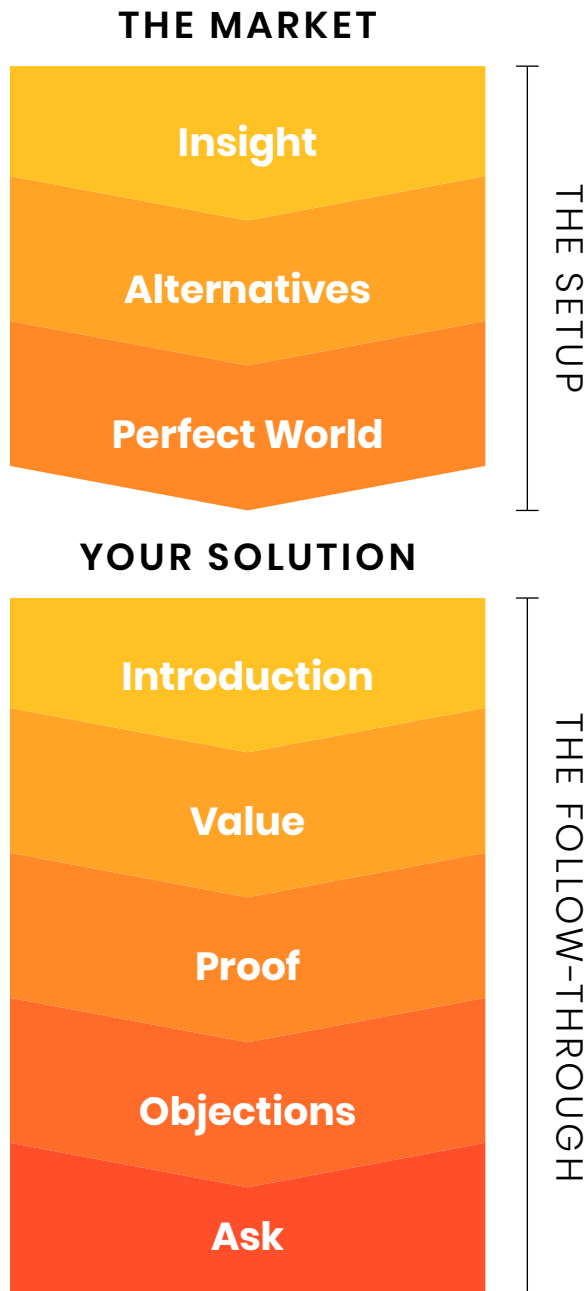
Value Theme #3

Supporting capability 1
Supporting capability 2

Best-Fit Customer (account characteristics)

Market Category:

Sales Pitch Components



1. **Insight** – what do you understand about the situation, customers and solutions that the other vendors in the space do not?
2. **Alternative Approaches (pros and cons)** – what are the other approaches to the job that a customer could take and what are the pros and cons of those?
3. **Perfect World** – The characteristics of a “perfect” solution for your target customer.
4. **Introduction** – Introduce the company and the solution.
5. **Differentiated Value** – Outline each point of differentiated value and the features that enable this value.
6. **Proof** – what is the proof that you can do what you say you can do?
7. **Objections (optional)** – handle common objections including migration, getting started, pricing structure
8. **The Ask** – what would you like the prospect to do next.

Mapping Components

How we can map the sales pitch components to the positioning components:

1. **Insight** – Your insight is tightly tied to your Differentiated Value. Put another way, the insight is the reason you built what you built the way that you built it and the reason why you can deliver value that your competitors cannot.
2. **Alternative Approaches (pros and cons)** – this maps directly to the Competitive Alternatives component of your positioning.
3. **Perfect World** – This is closely tied to your Differentiated Value.
4. **Introduction** – This is where you introduce your product, often using your Market Category as a starting point.
5. **Differentiated Value** – This is the meat of the sales pitch and maps directly to your Differentiated Value.
6. **Proof** – this is generally a customer case study or other proof that you can deliver on the value you said you could deliver.
7. **Objections (optional)** – this isn't mapped to positioning per se but should address the concern that the prospect may not be able to realize your differentiated value.
8. **The Ask** – this is the next step in your sales process.

The Sales Pitch Process Reference Sheet

1. **Insight** – Start by articulating your point of view on the market. Your “insight” is the key thing your prospects need to understand in order to understand the importance of your differentiated value.
(Page 107)
2. **Alternative Approaches (pros and cons)** – This can be a table or a chart that lists the alternative ways of solving the problem and the pros and cons of each. This step should be a discovery conversation with the prospect.
(Page 119)
3. **Perfect World** – This should be the conclusion of the discussion in the previous step. It will be a list of characteristics of a “perfect” solution and will map to your differentiated value themes.
(Page 135)
4. **Introduction** – Switching gears we will now introduce the company and the product.
(Page 145)
5. **Differentiated Value** – This forms the “meat” of the pitch. We will walk through each of the value themes and the key capabilities that enable them. This is frequently done using a demo.
(Page 151)
6. **Proof** – Typically this is a case study or other 3rd party validation that proves we can do what we say we can do.
(Page 163)
7. **Objections (optional)** – This is an optional step to handle any common important objections. This could be a discussion about migration, deployment, pricing structure, integration or security issues.
(Page 169)
8. **The Ask** – we conclude the pitch with a discussions of the next steps. This could include a follow-on meeting or simply sending a proposal.
(Page 177)

The Sales Pitch Storyboard

Product or Company:

Date Completed:

Insight:

Competitive Alternative Approaches

Approach #1

Approach #2

Approach #3

Perfect World

Characteristic #1

Characteristic #2

Characteristic #3

Introduction:

Differentiated Value

Value Theme #1

Supporting capability 1

Supporting capability 2

Value Theme #2

Supporting capability 1

Supporting capability 2

Value Theme #3

Supporting capability 1

Supporting capability 2

Proof

Objections

The Ask

Conclusion: How Can I Help?

My goal with this work is to help folks do great positioning and successfully sell products to people who are going to love them. I sincerely hope you found this workbook and the books that go with them useful.

I work as a consultant one on one with companies that are struggling with their positioning and how to effectively communicate it in the market. You can learn more about my services at aprildunford.com/services.

In addition to the books and these templates, I also host a podcast where we dive deeper in the methodologies and the thinking behind them.



You can listen to my podcast
'Positioning with April Dunford'
at positioning.show

If you found value in this work, I would love for you to leave a book review on Amazon. As an author, reviews mean a lot.

Thanks in advance!

April Dunford

A handwritten signature in black ink, appearing to read 'April Dunford'.