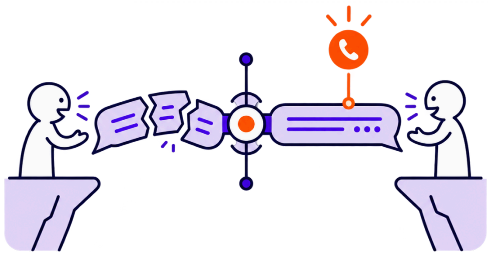
Sales messaging that survives the first call

Seven decisions between positioning and a sentence your buyer repeats. For awareness, understanding and trust across the whole customer journey, not just the first call.

Inside:



Why messaging fails on the anchor, not the wording · Step 1: Choose the primary anchor · Step 1b: Secondary anchors, and when they hurt · Step 2: The one-sentence position

16 PAGES TO PRINT AND FILL IN · 3 DIAGRAMS

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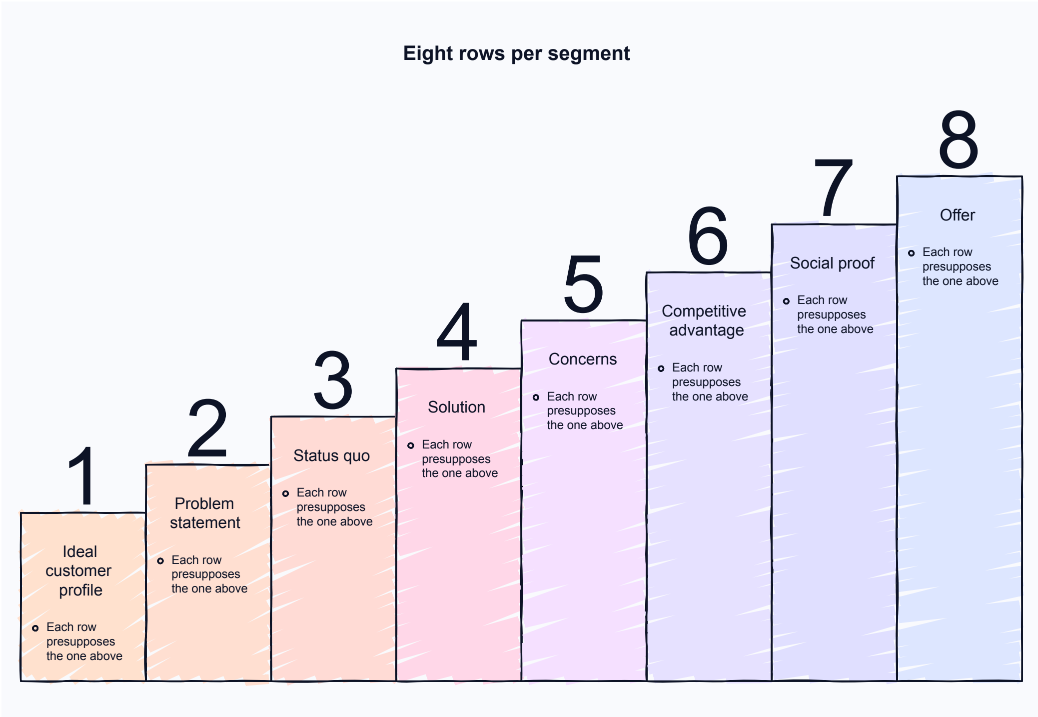
Every page stands on its own. If you are short on time, jump straight to the step where it is stuck at your end.



SKETCH · THE EIGHT ROWS

What this is for, and who should skip it

Most messaging projects in mid-sized B2B companies do not fail on the copy. They fail one level up, on a positioning decision that was never actually made. The team then spends months producing variants of a claim that does not hold, and concludes that none of the variants work.

This playbook walks through the seven decisions that come before the first sentence. By the end, a team has a one-sentence position, three to five claims that support it, and one messaging column per segment that an AE can use in a live conversation.

Who it is for

Founders, CROs, VPs of Sales and marketing leads at B2B technology companies with 25 to 500 full-time employees serving two or more buyer groups, who have noticed the same deck landing with one group and dying with the other.

Who should skip it

Teams with exactly one segment and one obvious market leader as the alternative. There, the positioning question is settled in an hour and this document is overhead. And companies that have not yet found a paying segment. Positioning sharpens what works. It is not a substitute for finding it.

What this is not: a copy bank. There are no phrases here to lift. There are the decisions that phrases get derived from, so the result fits your company rather than ours.

Time required: two 90-minute sessions with three to five people. One for steps 1 through 5, one for steps 6 and 7. Attempts to compress it into a single two-hour meeting reliably stall at step 3.

> DOCUMENTED · HOLYCODE
>
> Holycode built trust in the mid-market and enterprise segments on a new positioning, in six months. Read the case study

Why messaging fails on the anchor, not the wording

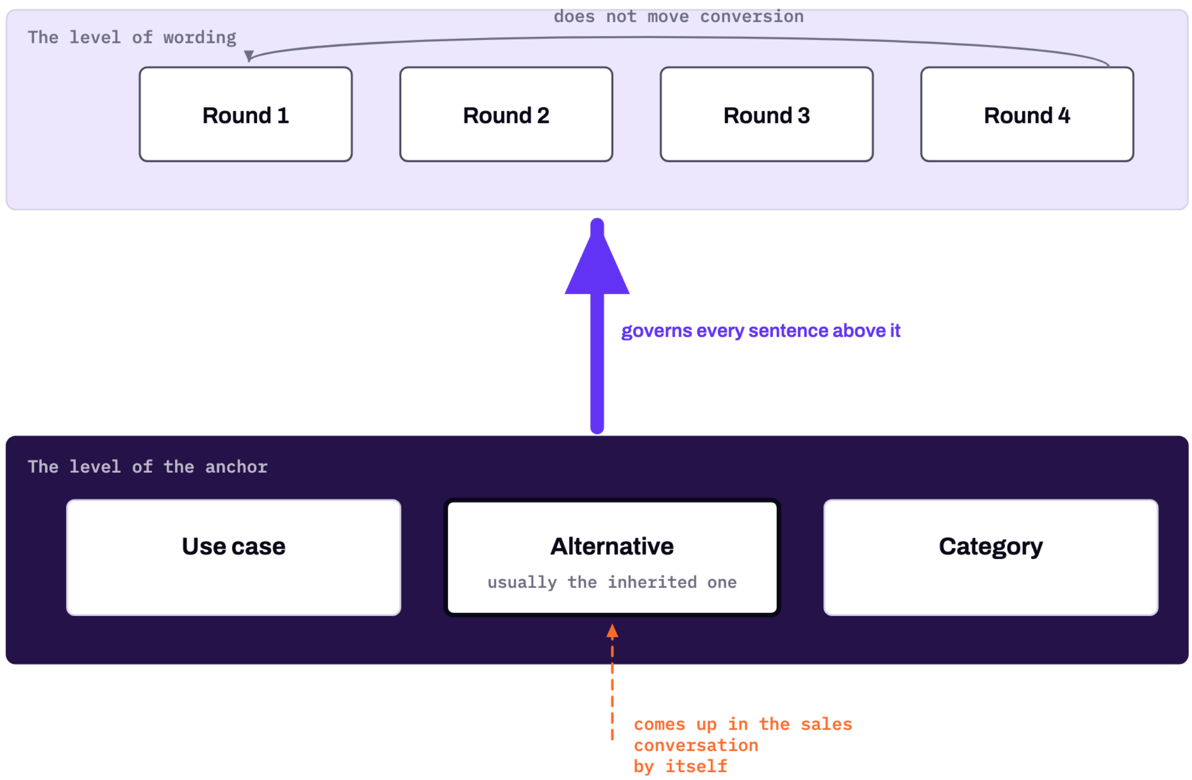
An anchor answers one question: **what is this offer being compared to?** There are exactly three options, and the choice governs every sentence that follows.

EVIDENCE [what buyers expect in a first call]

ANCHOR	WHAT THE BUYER UNDERSTANDS	WHAT THE PRICE IS MEASURED AGAINST
Use case	"This solves that specific problem"	the cost of the problem
Alternative	"It is like X, but better at Y"	the price of X
Category	"This is a new kind of tool"	nothing. The buyer has to work it out

Most teams do not choose an anchor, they inherit one. Usually the alternative, because it comes up in the sales conversation by itself. That is the most expensive of the three: positioning against an existing product means accepting that product's price frame and its definition of the problem.

GRAPHIC G1



How to tell the anchor is the problem rather than the copy: the team has been through three or more rounds of wording, each one reads plausibly, and none has moved conversion. Round four will not fix it either.

So the question is never "which claim sounds better." It is: **what do we want this buyer to compare us against, and can we win that comparison?**

Step 1: Choose the primary anchor

An offer has one primary anchor. Not two. Two means the buyer decides which one applies, and buyers decide based on whatever is already familiar to them.

The decision questions, in this order:

1. **Is there a problem the buyer already spends money on?** Internal hours count. If yes, a use case anchor is the strong candidate, because the price frame already exists.
2. **Is there a product the buyer names when describing the problem?** If yes, and if you are genuinely better in one nameable dimension, an alternative anchor is viable. Check first: does that dimension matter to the buyer, or only to you?
3. **Both no?** Then it is a category, and the positioning needs a budget for market education. That is a funding decision, not a copy decision.

The hard test: write the anchor as a sentence a buyer would say, not one marketing would say. "We need something that solves X" is a use case anchor. "We are looking at alternatives to Y" is an alternative anchor. If no buyer has ever said either sentence, the anchor is assumed rather than observed.

Fill in

Primary anchor chosen:

Why this one (one or two sentences):

The sentence a buyer would say about it:

Step 1b: Secondary anchors, and when they hurt

A secondary anchor is fine when it supports the primary rather than competing with it. A pair that works: primary is a use case, secondary is the alternative that use case is currently solved with. The buyer understands the problem first, then why the obvious fix does not solve it.

A pair that does not work: primary is a new category, secondary is an alternative. The buyer hears "new kind of tool" and "like X, but different," and concludes it is X with fewer features.

The rule: at most two secondary anchors, and each one has to trace back to the primary in a single sentence. If it does not, it is not support. It is a second positioning.

The most common mistake here is serving all three anchor types at once, because each works for a different segment. The result is a website with three companies on it. Segment-specific wording belongs in step 6, not here.

Fill in

Secondary anchor 1:

Traces back to the primary how (one sentence):

Secondary anchor 2 (optional):

Traces back to the primary how (one sentence):

Step 2: The one-sentence position

One sentence. Not a paragraph, not two clauses joined by a semicolon. It answers three things: for whom, against what, and what becomes possible.

The test is not whether it reads well. The test is whether an AE can say it in a conversation without translating it. Sentences that work in a deck and die in a call are the normal case, and the reason positioning documents end up in folders.

Three counter-examples, and what is missing in each:

> "We are the leading platform for data-driven revenue excellence."

No anchor, no buyer, nothing checkable. It describes an ambition rather than a position. "Leading" is a claim without evidence, and three adjectives stacked in front of a noun is a register this buyer skims past.

> "We help B2B companies scale pipeline with AI."

Audience too broad, mechanism absent, and "AI" says nothing about what the system does. A buyer cannot work out whether it applies to them.

> "We are an alternative to [market leader] for mid-sized teams."

The anchor is chosen, but the dimension is missing. An alternative in what respect? Without it, the buyer hears "the same thing, cheaper," and negotiates on price.

The pattern that holds: *For [observable segment] who [situation], [offer] is how you get [outcome] without [the cost of the obvious alternative].*

Fill in

Our one-sentence position:

Can an AE say this in a call without translating it? yes / no

If no: what do they translate away? That is the actual core.

Step 3: Problem summary in the buyer's voice

The problem summary is the paragraph a buyer reads and thinks: that is us. It is therefore the only place in this playbook where you do not use your own language, you use theirs.

EVIDENCE [what CROs are measured on in 2026]

Three rules:

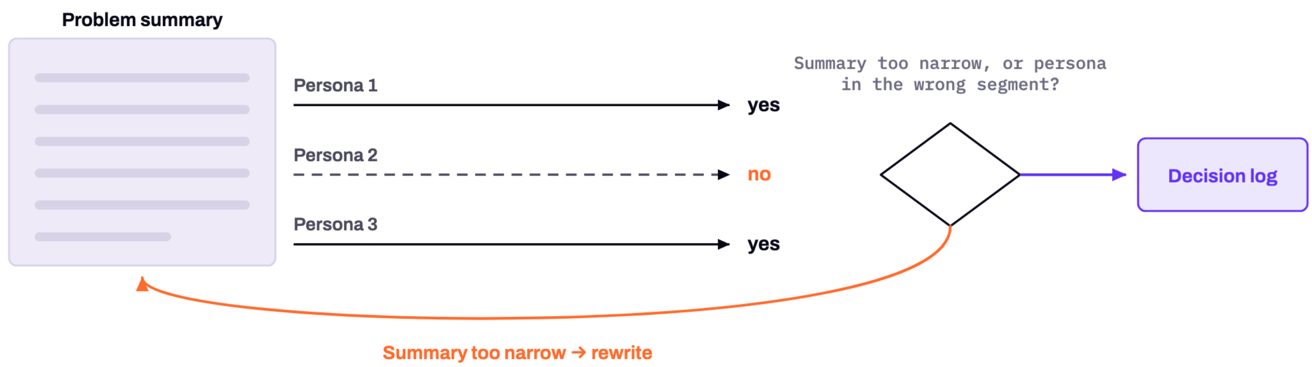
1. **A moment, not a category.** Not "inefficient processes," but the Tuesday morning when the forecast is wrong and nobody can say why.
2. **Make the cost tangible** without inventing a number. If you have no evidenced figure, describe the effort instead: how many people, how often, for how long.
3. **No solution.** The moment the summary explains how it gets better, the buyer is reading a sales claim rather than a description of themselves.

Three to five sentences. One short paragraph.

The three-personas-nod test

Read the problem summary as each of your defined buyer personas. Does each one recognise it as their problem?

GRAPHIC G2



If one does not, the summary is too narrow and gets rewritten. That is a stop, not a note. The test happens here rather than later, because a summary that is too narrow constrains every decision after it.

The edge case that looks like a test failure: if a persona does not recognise the problem *because they genuinely do not have it*, the summary is not wrong. That persona does not belong in this segment. That is a segmentation finding, and it goes in the decision log.

Fill in

> Problem summary (three to five sentences, buyer's voice, no solution):
>
> Persona 1 recognises it: yes / no
>
> Persona 2 recognises it: yes / no
>
> Persona 3 recognises it: yes / no
>
> On any "no": summary too narrow, or persona in the wrong segment?

GO DEEPER

the five roles in the buying center

EXTERNAL EXAMPLE · UNIQUE

One page per use case, not one page for everything. Unique's AI Factory lists 18 agents, each with its own page, one sentence on what it does, and filters by industry and department. The reader finds their case instead of deriving it from a product description.

unique.ai/ai-factory · retrieved 7 September 2026

Step 4: Differentiation without "we are better"

A differentiator is checkable or it is not a differentiator. The test: could a competitor say the same sentence about themselves? If yes, it is not a distinction, it is a row in a feature table.

NOT CHECKABLE	CHECKABLE
"We are faster"	"A setup goes live in days rather than quarters, because X"
"We have better support"	"One named contact, who built your setup"
"We are more flexible"	"Scope is agreed before kickoff, changes run through a named process"
"We understand the industry"	"Named, referenceable projects in the same market segment"

And the rule that matters more than the table: acknowledge the competitor's real strength first. Not out of politeness. A buyer who has evaluated the competitor's product knows it is good. Talking it down costs you credibility for everything else in the conversation.

The pattern that works: *"[Competitor] is strong software. The question is not which one can do more. It is which system produces more shipped work at [this team size]."* That moves the argument off the feature list and onto execution, and execution is where it can be won.

Fill in, per relevant competitor

Competitor:

Their genuine strength (one sentence, meant seriously):

The condition under which they are the weaker choice:

The capability on our side that closes that gap:

EXTERNAL EXAMPLE · UBERALL

What a distinction looks like with numbers. On its page for charge point operators, Uberall states numbers instead of adjectives: 54,000 listed charge points, 150 maps and directories, +55% more views, +56% more clicks for directions, +39% more revenue per click. Every number sits next to the feature that produces it.

uberall.com/en-us/solutions/ev-charging · retrieved 7 September 2026

Step 5: Supporting pillars, three to five

A supporting pillar is a claim that backs the one-sentence position and holds across **every** segment. Three to five of them. More than five does not mean more substance, it means nothing was prioritised.

The exclusion rule, which is the entire value of this step:

> If a pillar only applies to one segment, it is not a pillar. It is segment-specific messaging, and it moves to step 6.

Without that rule, the pillar list fills up with everything that happens to be true somewhere. The result is a list nobody uses, because in any given conversation half of it does not apply.

The check, per candidate:

1. Does it support the one-sentence position, or is it merely true?
2. Does it hold for every defined segment?
3. Could a competitor say the same sentence?

Two yeses and one no. On question 3 the answer has to be no.

Fill in

PILLAR	SUPPORTS POSITION	HOLDS ACROSS SEGMENTS	NOT COPYABLE
Pillar 1	☐	☐	☐
Pillar 2	☐	☐	☐
Pillar 3	☐	☐	☐
Pillar 4 (optional)	☐	☐	☐
Pillar 5 (optional)	☐	☐	☐

Moved to step 6 because single-segment only:

Cannot get to three pillars that hold across every segment?

That is not a wording problem. It almost always means the anchor from step 1 does not carry the span of your segments. In a free 60-minute Sales Acceleration Call we look at your segments and tell you whether the anchor can hold or whether the split sits somewhere else.

meetings.hubspot.com/salesplaybook/-sales-acceleration-call-with-salesplaybook- · no pitch, an honest assessment

Which message leads, and when

The same positioning needs a different entry point depending on how much the buyer already knows. Anyone who always opens with the capabilities of the offer loses everyone who has not yet named the problem.

AWARENESS	WHAT YOU LEAD WITH	WHY
Problem unaware	the **alternative**, meaning what they do today	they recognise themselves in their own routine, not in a problem label
Problem aware	the **problem**	they are looking for someone who describes it more precisely than they can
Solution aware	the **capabilities**	they are already comparing and need distinctions
Offer aware	the **specific differences**	they are choosing, not understanding

The most common mistake sits in the first row. Someone who has not named their problem does not search for it. They only recognise themselves in their own routine: the tool they use, the process they run every week. That is why the alternative leads there, not the problem.

Creating demand and capturing demand are two messages

They do not belong in the same document, and the ratio is uneven:

	CREATING DEMAND	CAPTURING DEMAND
Where	articles, LinkedIn, talks, newsletter	website, landing pages, the offer
About what	the **problem** and its causes	the **capabilities** that solve it
Share of effort	the substantially larger part	the smaller one
Purpose	appear earlier in the decision process	catch those already searching

Why the ratio is so lopsided: anyone who only appears once somebody actively searches competes with everyone else who appears at that moment. Anyone who explains the cause beforehand shapes what gets searched for in the first place.

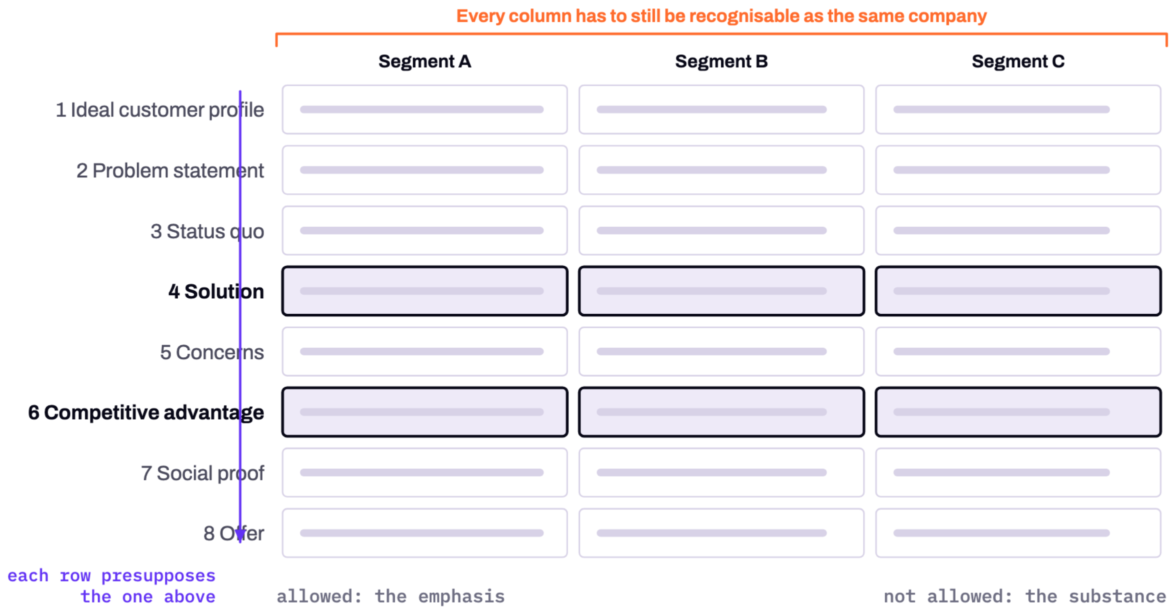
And the rule that follows: do not mix the two in one text. An article that turns into a capability list halfway through loses the readers who were still on the problem, and does not convince the others either.

Step 6: Messaging per segment, the eight rows

This is the working document an AE actually opens. One column per segment, eight rows. The order is not arbitrary: each row assumes the one above it.

#	ROW	WHAT BELONGS IN IT
1	**Ideal customer profile**	Three to five sentences. Geography, industry, size, operating model, tech stack, scale indicator. A mental image, not a pitch
2	**Problem statement**	In the buyer's voice. A specific moment, not a category. No solution
3	**Status quo**	What the buyer does today that creates the problem. Name the actual tools. Step by step
4	**Solution**	What the offer does for *this* segment. Structure: what connects, what becomes possible, how fast it goes live
5	**Concerns**	Three to four objections specific to this segment. Format on page 14
6	**Competitive advantage**	One paragraph per relevant competitor. Named. Limitation, segment, capability
7	**Social proof**	One or two proof points. Company name, result in one line, why it is relevant to this segment
8	**Offer**	The single most compelling reason to take a meeting. What they will see. Two to three sentences

— GRAPHIC G3



Two rules on row 7, because they are the ones most often broken: a proof point without a named source is not proof, and a missing proof point gets marked as missing rather than filled in. An invented number in a messaging document travels into proposals and decks, and eventually someone checks.

GO DEEPER

[cut by job, not by size]

Step 6b: The cross-segment consistency test

Once the columns are filled, read them side by side. **Every column has to still be recognisable as the same company.**

If two segments read like two different businesses, the messaging is not what is wrong. The anchor from step 1 does not carry the span. Then you go back to page 5. That is unwelcome, and it is the point that decides whether this document is still in use a year from now.

How to spot it:

- Row 4 (solution) describes two different products in two columns.
- Row 6 (competitive advantage) names competitors from two different markets.
- The one-sentence position visibly fits only one of the columns.

The permitted difference is emphasis: which pillar leads, which objection gets more room, which proof point is shown. The difference that is not permitted is substance.

What that looks like concretely, shown on row 4:

	HOLDS	DOES NOT HOLD
Segment A	"connects quote, order and invoice in one flow"	"automates quote creation"
Segment B	"connects the same steps, but across two sites"	"gives management a dashboard"

On the left the same system appears twice with a different emphasis. On the right there are two products, and a buyer who sees both columns is right to ask which one they are buying. The test takes ten minutes and is the only one in this workbook that checks the work of steps 1 to 6 as a whole.

Fill in

Segments read side by side on: Recognisably the same company? yes / no If no: which row breaks, and does this go back to step 1?

Step 7: The objection table

Objections do not get paraphrased. They get written down verbatim, the way they land in a call, and then turned in **one** sentence.

EVIDENCE [why deals die slowly instead of closing quickly]

The format, and it is strict:

> *"[Objection verbatim, as a buyer says it]"* → [reframe in one sentence]

One sentence, because an AE cannot recite a paragraph mid-conversation. Three to four objections per segment. More is not better: the list has to be recallable from memory.

Three examples of the format. The wording comes from our own project conversations, anonymised and deliberately not smoothed:

> *"We already have a CRM, people can see the new contacts in it."* → They can see them. What they cannot see is which one goes first.
>
> *"I get the idea, it is not wrong, but it is very hard to do in practice."* → Then the question is not whether the work happens, it is how reliable the result is at the end.
>
> *"We do not have the internal time for this."* → Which is exactly why the scope is fixed before kickoff, rather than discovered during the project.

How to spot a bad reframe: it contradicts the buyer. A good reframe agrees with them and moves the question. Buyers are rarely wrong about their own situation. They have just asked a different question than the one that decides it.

How to get real objections inside two weeks

Not from a workshop. An objection invented there is phrased more politely than a real one, and that missing edge is exactly what the reframe needs to work against.

1. **Watch ten call recordings**, mixed won and lost. Not only lost: the objection raised in a deal you won was answered, and the answer is on the same recording.
2. **Write it down verbatim, without smoothing it.** "Very hard to do in practice" is a different objection from "too complicated", and it needs a different answer.
3. **Sort by frequency, not by difficulty.** Three or four survive. That is the table.

Step 2 is the one that gets skipped. A smoothed objection loses the place where it hurts, and after that the reframe reliably misses.

The decision log

Every decision in this playbook gets a row. Not for documentation, but because in six months someone will ask why the anchor was chosen this way, and by then nobody has the reasoning.

WHAT	DECISION	REASONING	REVIEW WHEN
Primary anchor			
Secondary anchors			
One-sentence position			
Pillars excluded			
Segment boundaries			

The "review when" column is the important one. A positioning without a review date either never gets touched or gets relitigated every time a new competitor appears. A sensible cadence is every six months, plus two triggers: a new segment passes a fifth of revenue, or a competitor visibly changes their positioning.

What belongs in the log even though it is uncomfortable: the rejected alternatives. A log that records only the chosen path reads as obvious a year later, and then the decision gets reversed without knowledge of the trade-off.

One filled-in row, so the form is clear. The content is constructed:

WHAT	DECISION	REASONING	REVIEW WHEN
Primary anchor	use case "quote to invoice without a break in the chain"	both segments already spend money on this, so the price frame exists. Alternative rejected because it forces us into the market leader's price frame	03/2027, or earlier if a new segment passes a fifth of revenue

How to recognise good reasoning: it names what argued against. "Fits best" is not reasoning, it is the outcome. Someone reading a year from now what was rejected and why can test the decision. Someone reading only the outcome can either believe it or overturn it.

Checklist and next step

Tick before rolling this out:

- ☐ One primary anchor, not two
- ☐ Every secondary anchor traces to the primary in one sentence
- ☐ A one-sentence position an AE can say without translating
- ☐ Problem summary in the buyer's voice, no solution
- ☐ Three-personas-nod test passed, or segmentation finding logged
- ☐ Every differentiator checkable, no competitor talked down
- ☐ Three to five pillars, each holding across all segments
- ☐ Eight messaging rows filled per segment, no proof point invented
- ☐ Consistency test passed: recognisably the same company
- ☐ Three to four objections per segment, verbatim, reframe in one sentence
- ☐ Decision log with review dates

If three or more boxes are open, the document is not ready to roll out. Half-decided messaging is worse than the old version, because two versions are then circulating at once.

The next step, when it stalls

The place teams get stuck most often is step 1: the anchor will not resolve, because two segments demand different ones. At that point it is no longer a copy question, it is a segmentation question.

Where this document reaches its limit: it sharpens what already works. It is not a substitute for finding the segment that actually pays. If you have not found that yet, positioning is the second step, not the first.

In a **free 60-minute Sales Acceleration Call** we go through your situation and tell you whether positioning is the constraint or segmentation is. Including when the answer is that we are not the right partner for it.

Free, 60 minutes, no pitch, an honest assessment of whether there is a fit.

WHO YOU WILL MEET IN THE SALES ACCELERATION CALL

Manuel Hartmann

Founder & CEO · SalesPlaybook

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NEXT DECISION

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