A positioning statement template, and how to test it

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A positioning statement template is a single fill-in sentence that records who you serve, what changes for them, how, and what they would otherwise do. It is an internal decision tool, not a tagline. It only earns its place once you have tested it against real buyers' words and real won and lost deals.

The template

This adapts Geoffrey Moore's well-known positioning format from Crossing the Chasm. The structure is familiar. The useful part is filling it in slowly.

> For [segment] who [situation or trigger], we help you [outcome] by [mechanism], unlike [the real alternative], which [its limitation].

An optional extra blank is the category or frame of reference: what kind of thing buyers will compare you with. Leave it out if buyers already know where to put you.

What each blank is really asking

Blank	The question it asks	Where the honest answer usually comes from
Segment	Which kind of buyer do we serve best, in a way we can name? Pick one priority segment; the direction canvas allows up to three to consider, but the statement takes one.	Your best-fit clients, not your widest possible market
Situation or trigger	What has happened that makes them look for help now?	Discovery calls, and how enquiries describe the problem
Outcome	What is different for them afterwards, in their terms?	The words clients use, not your service names
Mechanism	How do we get there, in one clause?	What you actually do differently in delivery
Category or frame of reference (optional)	What kind of thing will buyers compare us with?	How buyers describe their search, and what they shortlist
Real alternative	What would they do if we did not exist?	Lost deals and the "we'll sort it ourselves" conversations
Limitation	Why does that alternative fall short, specifically?	What buyers say went wrong last time

The real alternative row matters most. It is often doing nothing, or doing it in-house, rather than a named competitor. A statement aimed at a rival your buyers barely consider will not help in real conversations.

The "so what?" test. Take each claim in the finished statement and put three questions to it.

- Would a buyer reasonably say "so what?" If so, the claim describes you, not them.
- Can they verify it? If they would have to take your word for it, it is a claim, not a reason to choose you.
- Could a competitor equally say it? If yes, it is not positioning. It is table stakes.

In my experience, first drafts usually get shorter.

An illustrative example

This one is invented and fictional, a small advisory firm made up for the purpose. It is not a benchmark or a real client.

> For owner-managed accountancy practices who have just taken on their first marketing hire and have no agreed priorities, we help them settle a ninety-day plan and its owners by agreeing priorities before any spend, unlike hiring an agency straight away, which tends to start activity before anyone has agreed what it is for.

It has one segment, no adjectives and a real alternative that is a common decision, not a named rival.

Three checks that it is doing its job

- **One message, three places.** Your website headline, your LinkedIn headline and the first line of a sales call say recognisably the same thing.
- **A stranger can say who it is for.** If someone outside the business cannot tell you who it is aimed at, the segment is too loose.
- **The first question changes.** Sales conversations stop starting with "so what do you actually do?" This one is slow to show, but I would treat it as a strong signal rather than proof.

Where these statements usually go wrong

- **Services described, not outcomes.** "We provide strategy, content and CRM support" tells a buyer what you sell. It does not tell them what improves.
- **Differentiating on unverifiable words.** "Experienced", "trusted" and "tailored" cannot be checked, and every competitor uses them.
- **Several audiences in one line.** Pick the one you serve best and let the others find you anyway.

How to test it

A statement written alone at a desk is a hypothesis. Here is how I would test it:

- Say it aloud to five recent clients and ask them to repeat it back in their own words.
- Compare what they say with the deal notes from when they bought.
- Read your last five lost deals against the real alternative blank. Did the buyer do what you said they would?
- Change the statement where these disagree.

Buyers' recalled reasons for choosing you are given after the fact, and people tidy their own history, so triangulate with notes from the time. A mismatch is useful information, and cheaper to find on one page than after a website is built around it. Revisit the statement in a regular review so it does not go stale.

Free downloads, no sign-up: the worksheet (PDF), an editable version (Word) and this guide as a PDF.

Where to start

If you would like to do this with evidence from how your business already wins work, rather than alone at a desk, the offer, positioning and proposition development page explains how I approach it. If you are not sure positioning is the real gap, a Strategic Marketing and Operations Review will say so plainly.

Frequently asked questions

What is a positioning statement?

It is a short internal statement of who you serve, the situation that brings them to you, what changes for them, how you do it and what they would otherwise do. It guides decisions about messaging and offers. It is not public copy.

Is a positioning statement the same as a tagline?

No. A tagline is public and built to be memorable. A positioning statement is private and built to be specific. The website, sales conversations and proposals should be recognisably consistent with it, but it does not need to be quotable.

How do I know if my positioning statement is any good?

Check three things: your website headline, LinkedIn headline and the opening of a sales call say recognisably the same thing; a stranger can say who it is for; and prospects stop opening with 'so what do you actually do?'

Who is the real alternative in a positioning statement?

Often it is doing nothing, or doing the work in-house, rather than a named competitor. Ask lost and won buyers what they considered instead, and use their words rather than your assumption.

This is a copy of the guide at chapmansconsulting.co.uk/insights/positioning-statement-template/. The web version is kept up to date; this copy is as at 29 September 2026. Free to share; please credit Chapman's Consulting.