

**Stratinn**



# **Crafting a compelling proposition.**

**A guide for marketers in  
complex B2B organisations.**

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# Contents.



<b>What's this guide for?</b>	<b>1</b>
<b>Art supported by science.</b>	<b>3</b>
<b>Phase 1 – Exploring the insight to build the foundation.</b>	<b>6</b>
Step 1: Insight gathering across the 3 Cs.	<b>7</b>
Step 2: Synthesising insights.	<b>17</b>
<b>Phase 2 – Design, iterate and validate your proposition.</b>	<b>19</b>
Step 1: Your initial proposition(s).	<b>20</b>
Step 2: Customer desirability testing.	<b>24</b>
Step 3: Assessing and ensuring delivery capabilities (feasibility & viability).	<b>25</b>
Step 4: Prioritisation (if required).	<b>25</b>
<b>Phase 3 – Produce, plan to deliver and engage.</b>	<b>26</b>
Step 1: Flesh out the proposition.	<b>27</b>
Step 2: Go-to-market plan and proposition roadmap.	<b>28</b>
Step 3: Building the blueprint.	<b>29</b>
Step 4: Sharing the proposition.	<b>30</b>
Step 5 (ongoing): Iteration vs consistency.	<b>30</b>

# What's this guide for?

**We've designed this guide to equip B2B marketing leaders with a step-by-step approach to developing propositions that resonate with customers and drive business growth.**

It's the core of how we support clients. The tools, techniques and processes aren't rocket science but the magic comes in the execution, engagement and creative thinking along the way. But we would say that, wouldn't we?

Through this guide, we'll show you how you can put the pieces of your proposition together.

If you're still unsure about why good propositions or proposition thinking are important in your business, take a look at this article first:

**[The language of proposition – It's in everything you do.](#)**



# What is our definition of proposition?


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**Proposition is one of those words that has many different meanings to many different people. So, for clarity, when we say proposition, we simply mean articulating...**


...**WHAT** you do  
and **HOW** you do  
it...



...in a way that resonates and  
motivates a buying decision with  
the customers you are targeting  
(**WHO & WHY**)...



...and explains how you are  
**DISTINCTIVE** (or even unique)  
in the market.



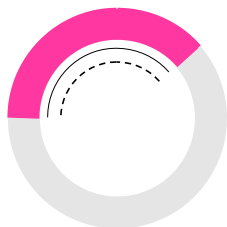
# Art supported by science.

Although this guide walks you through the process, proposition development is an art as much as it is a science. Some parts of this are formulaic while others require creative

thinking and the ability to wrangle complexity to explore less obvious connections between pieces of insight and ideas.

Our approach breaks down into **3 core phases...**

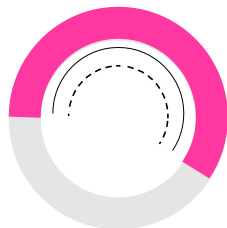
## Phase 1 – Exploring insights to build the foundation.



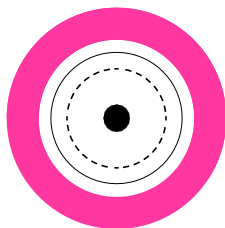
You'll build an insight base to help understand customer needs, business capabilities, competitors and market dynamics, along with company ambition. This acts as a comprehensive, solid foundation for Phase 2.

## Phase 2 – Design, iterate and validate your proposition.

The aim is to connect the dots in the insight base to develop creative and compelling propositions. You'll test options with customers and your people. You'll continually iterate and ultimately, help key decision-makers in your business prioritise which proposition to progress with.



## Phase 3 – Produce, plan to deliver and engage.



This is where you'll document the proposition along with developing a roadmap for how it can evolve into the future. You'll start to work with the business to start executing on the promise.

## Tried and tested.

We've used this approach to help organisations from the very large to the very small. For one of the UK's largest insurers, it was the catalyst for **20% y.o.y. growth** in their SME business line and the start of a transformation agenda that changed the experience brokers had resulting in **>30 NPS (Net Promoter Score)** improvement.

Another global insurance client saw an even more immediate impact, with sales enquiries increasing **137%** in the quarter following the launch of a new proposition. For a leading UK energy provider, orienting a smart home thermostat proposition around the aesthetic and user experience needs rather

than the 'smartness' of the technology and education of using the device helped drive a **400%** increase in sales month-on-month.

At the other end of the spectrum, a niche SME construction business used this approach to develop a proposition that became the foundation for the development of a new commercial function. They have now established a team from scratch and the distinct proposition has been central to a greater than-forecasted **25%** annual growth rate.

As well as being useful across different types of organisations, it can also be deployed to develop propositions at different levels of the same business. It works for specific business units (and sub-units or products) as well as at the corporate brand level. The fundamentals of the approach stay the same. What you explore, who and how many people you speak to (internally and externally) and who makes key decisions along the way will change.



**For one of the UK's largest insurers, it was the catalyst for 20% y.o.y. growth and the start of a transformation agenda that changed the experience brokers had.**

## Setting the stage

## for proposition development.

Given you're reading this guide, we're guessing you've bought into the idea of proposition. But before diving into the process, it's essential to establish the case for doing it in the first place.

Your objectives are probably clear in your mind. Something like 'creating a distinctive and compelling offer for a focus or target customer group'. In essence, an articulation of 'why customers should buy from you over competitors. You know this has value to help steer your marketing activity over the next year. However, the proposition, although led by you, is NOT just a marketing exercise. Done properly, it should benefit teams across the business. That includes sales, strategy, customer experience, change and transformation.

They will be the ones you are working with to bring the proposition to life beyond the market message.

So, before you get going ask yourself, have you engaged and articulated the benefits to these recipients, how will it help them achieve their objectives and are they clear what they can do with the proposition once it's done?

Use our  
**Proposition  
Calculator** to  
quickly evaluate  
your proposition  
today compared to  
industry standards.



# Impact on others.

## Sales teams

- Be clear about how it informs and/or helps them create collateral to use in initial engagements with prospective clients.
- Explain how you'll work together to create that collateral based on the proposition.
- Help them understand how it'll ensure marketing messages and sales will be more aligned.

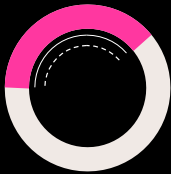
## Change / Transformation / CX teams

- Explain how it will help them prioritise which improvements could be made. Aligning what they implement around what will have the biggest impact on the target customer.
- You can discuss how open are they to changing and evolving plans based on the results of the proposition work.

## P&L owners and corporate strategy

- Explain how customer-led propositions can inform key decisions within the business and influence strategy in a way that meets emerging customer needs.
- How does it ensure their efforts help the business evolve to build true competitive advantage and resonate with customers?
- How will it help them provide better clarity and inspiration to their people?
- Will it open up new ways to develop their people, products and services?

# Your “how to” guide.



## Phase 1

### Exploring insights to build the foundation.

The initial phase of developing a compelling proposition begins with a deep look into your business. The best way to achieve this is through the **3 Cs** as lenses to guide your efforts: your **Customers**, your **Capabilities** (including reviewing strategy and future plans to develop capability) and your **Competitors**.

This exploration is vital for understanding customer needs, assessing your organisation's distinctive strengths and weaknesses to deliver, and evaluating your position relative to competitors. If you shortcut this step and move straight to a 'propositions workshop' as many do, then you will only be working with surface-level insights in 'the heads' of attendees. You'll not truly get under the skin of your business, reducing the chances of creating a distinctive proposition.



## Step 1 Insight gathering across the 3 Cs.

Ever been to Marrakech Jemaa el-Fna Square? A crowded marketplace where everyone's shouting about how great their products and services are? How would you make your voice heard if you were a trader? To be honest, that's a bit like how most online markets are like today, whether you're trading on insurance extranets or just trying to get attention on LinkedIn.

That's where the 3 Cs come in. They helpfully simplify things and form your toolkit for cutting through the noise and building a proposition that actually means something to your audience.

This step explains why these lenses are so important and will help you explore each of them so have the foundation to create something that's not just good, but genuinely compelling to customers and distinctive in the market (yes, even highly mature, commodified ones like yours).



### Lens 1: Customer.

The journey to a compelling value proposition begins with understanding your customers deeply – their needs, pain points, and decision-making processes.

It's not unusual for us to hear of companies and teams developing their value proposition in a workshop based on individual opinions or developing them solely with pre-existing data. This presents some significant risk to successfully developing their proposition. Although opinions of what the customer is feeling are often 'mostly' correct, they never paint the full picture and whilst using existing data might feel like it's focused on the customer, it has rarely been collected with the development of a proposition in mind.

### Your starting point. The customer...duh!

Starting with the customer, it's likely you won't be starting from scratch. The first step is to gather all the primary and secondary insights you have on your customers. Most organisations have a bank of previous research ready to harvest and analyse. This could include data from customer surveys, NPS feedback and/or live transcripts. With this data accessible, it might be tempting to rely on it alone to accelerate the process. While such insights are valuable, they might not always be directly actionable for your proposition.

It is usually data that has been collected for a wide range of purposes and from a variety of internal and external audiences. Don't rely on it alone. The key is to assess each piece and see which bits are relevant to articulating your proposition (remember to use the wider 3 Cs as a lens on what's important or not). Don't get us started on how much un-actionable data is collected on the premise of 'know your customer'...anyway, that's for another time.

Even if the data feels robust and comprehensive, we can't emphasise enough the importance of conducting primary research specifically oriented around your proposition. This is the only way to capture customer perspectives directly and hear what they say for yourself. The value is in digging that bit deeper and exploring areas that surface-level questions in a survey will not tap into.

One more thing. Try not to palm your interviews off to a researcher or agency, you or the team developing your proposition need to conduct the interviews. The level of understanding you get when engaging with a customer directly is invaluable. If you have an external organisation (like Stratinn) supporting you, ensure that the team designing the proposition are holding the interviews and again, not palming it off on 'lower-cost' resource (we see it happen all the time).



### Speak to the right people.

Before diving into setting up interviews, you need to be clear about who you want to speak to. The sexy, in-vogue language here is defining your 'Ideal Customer Profile' (ICP). This is a crucial step to make sure you are focusing your efforts on the most relevant customer segments. You only want to be gathering insight from the people you are aiming to appeal to. Get this wrong and the insight becomes useless (sorry but it's true).



**This is a crucial step to make sure you are focusing your efforts on the most relevant customer segments...Be aware, this can be quite an involved process.**

The first step is to consider the 'level' in the organisation you are developing your proposition for. If it's for a specific product or small business unit then a tightly focused customer group is required and being able to run 5-10 interviews where a strong set of common themes come through is needed. Whereas a group-wide or brand proposition, means you're likely to have a wider range of customer types and needs as you'll have a range of products, services and business units. Keep this in mind when selecting your target audience, the more disparate the needs the larger the number of customers you will have to speak to.

For some, this is easy. For others, it's less clear. For example, when working with a Marine Specialty insurer in the UK, their target customers were 'brokers of Specialty Marine insurance'.

A pretty well-defined group of people to target and speak to, though still not without complication as you'll find different product specialisms (cargo, hull, etc) and buying behaviours (wholesale vs. marine).

On the other hand, when working with a construction advisory professional services firm, it was less clear. They had an offering with multiple service lines that could be applied in many industries, with many different organisations, and for many different people within those organisations. If you're in this boat, you'll likely need to do a bit more work to analyse different customers and prioritise which group(s) you want to target first.

Here are a few things to consider:

- **Strength and variation of customer needs in each segment (the wider the variation in needs the more likely you are to have to make decisions on focus)**
- **Strength of competition**
- **Strength of existing relationships/ accessibility to customer**
- **Addressability by you and what you do**
- **Factors/trends impacting the market size and growth of each segment.**

Be aware, this can be quite an involved process. The effort required will depend on the volume of different market/customer opportunities open to you as well as the degree of certainty you (or those in your organisation) want before moving forward.



**At this stage, we suggest trying to engage with 7-10 customers through in-depth, c.1-1.5 hour long interviews.**

### Speaking to customers.

At this stage, we suggest trying to engage with 7-10 customers through in-depth, c.1-1.5 hour long interviews. This will allow enough time to unearth their needs and pain points beyond the obvious. In preparation, you will need to develop a discussion guide which breaks down into the following key sections:

- **Intro and objectives of the interview** – like with any good interview practice, get them comfortable and talking about themselves.
- **Understand needs** – ask them to explain the top factors they tend to look for in a supplier like you. Dive into the problems they think suppliers like you could solve. A good way to do this is to frame the question in a key decision-making moment. For example, "When you were considering which supplier to place new business with, what were the factors you considered (and why)?".

**Tip:** In preparation, you may want to use knowledge from existing insight or desk research to create a hypothesised list of needs. You can use these to prompt and probe the conversation if they do not reference them initially.

**WARNING:** When prompting, ensure you tag insights as prompted insights, separate to unprompted. These should have a lower weighting in your insight base as you're leading the discussion.

- **Evaluation of strengths and weaknesses** – If you're speaking to existing customers, ask them to compare your offerings to competitors. This provides insight into your market standing and allows you to understand who stands out and why. A key part of the work involved is comparing what customers think you're strong and weak at, compared to what your team think.

- **Evaluation and insight on competitors** – For potential customers or customers using you and others, understanding their current choices of suppliers will offer you valuable competitive intelligence. This is particularly useful in B2B markets characterised by opaque transactions and lengthy sales cycles. Get their opinions, positive and negative, from the interviews but also try to tease out what 'position' they hold in the customer's mind. For example, X company might be their go-to when price is really key, or Y might be their go to when they want to ensure a great service experience.
- **Prioritisation of needs** – Time to revisit their needs and get them to do a quick prioritisation. There are a couple of ways to do this but for both options, firstly you will want to playback the needs and show them visually. The first option you can use is simply to get them to rank the needs from most to least important. The second option (and we have found it preferable) is to get them to allocate a need to either a **MOTIVATING** need bucket (a need that influences the buying decision) or a **HYGEINE** need bucket (a need that must be addressed by suppliers and if absent, will discount a supplier but the interviewee doesn't use it to drive a final decision).

**Tip** - if time is tight, this can be an exercise you send them after the interview via a survey or over email.

- **Close with a magic wand** – it is helpful to close the interview with a question that gets the interviewee to pull out one critical piece of insight for you. This is where the magic wand question comes in. It gets the interviewee to identify the one thing they wish to see you, or other suppliers, deliver that would make their lives significantly better. Or you can frame it as the one thing that if a supplier did it, would make that supplier stand out.

**Recording.**

This might go without saying, but it's always best to capture a recording of the interview (do ensure you have permission, ideally in writing, and you have been clear to the participant how their information will be used) so you can refer back to the recording or transcription if required.

**Curiosity beats structure.**

Unfortunately, interview success doesn't automatically happen because you have a good structure. It comes through covering the obvious (quickly) and then digging into the underlying reasons behind them. We aren't saying you need to deploy a full 5 whys exploration of every response you get (we tend to steer away from generic consulting BS frameworks like that) but it's curiosity that allows you to uncover the little nuggets others aren't seeing or paying attention to. High levels of curiosity help you explore how the people in your customer organisations really FEEL about something rather than just getting their immediate 'professional opinion'.

By being highly inquisitive and digging deeper, you'll have the basis from which to create a more interesting and resonant proposition to your target audience. It's focusing on these things that help you become more distinctive and stand out from the same old messages you probably see from your competition.

**Tip:** It helps to run the interviews with 2 interviewers. It shares the load but also increases the opportunity for picking up on and exploring different areas of discussion.



**We aren't saying you need to deploy a full 5 whys exploration of every response you get (we tend to steer away from generic consulting BS frameworks like that).**

**Are 10 interviews enough?**

Qualitative interviews are more about depth and specifics over statistical robustness and breadth. So, the number of interviews doesn't have to be vast but it will require some judgement.

**Take stock once you have held the first 5-7 interviews.**

If you've clearly defined your target customer, by this stage, you should start noticing recurring themes. For instance, if five different interviewees highlight the same key needs or decision-making factors when choosing a supplier, that's a strong sign of emerging customer insights.

If that's the case, conducting more interviews won't add much value - though if you have the time, it can still be useful to push to 10-15. Every so often, interview #13 uncovers something unexpected. It's rare, but it happens.

On the other hand, if you're still seeing a wide range of opinions or new insights beyond 10 interviews, it's worth conducting more. Alternatively, it might indicate that your target customer group is too broad, and you're speaking to people with vastly different needs. Take a step back, review your insights, look for patterns, and consider narrowing your focus.

For example, in one project, we found stark differences between retail and wholesale brokers, even though both were commercial insurers in a specialty line of business. Their priorities and needs were significantly different, prompting us to reassess our sample and clarify exactly who we were developing the proposition for.



## Extracting the Insights.

Coding and theming allow you to go from long-form transcription to an organised and ranked set of insights. Although structured, the thinking required is not formulaic and requires interpretation and judgement. However, you can typically follow a 4-step process:



- 1. Initial review:** shortly after the interview, engage with the other interviewer to discuss the key high-level themes you felt came out. Don't dig into specifics, just the overarching themes. Read the transcript if helpful.
- 2. Coding:** read through all the transcripts in detail, capturing the specific topics that came up. We tend to capture these in a Miro online whiteboard but you can use whatever tool you like. (Although Miro is pretty darn good!)
- 3. Theming:** look across the coded topics and start to cluster common themes. This may require a bit of lateral thinking as to how clustered you make them. The key is to end up with a shorter list, ranked by the number of interviews it was mentioned in, whether it was prompted or un-prompted and how strongly the need or opinion was held.
- 4. Review themes:** reviewing and re-clustering themes is always good advice, get a second opinion on whether your clusters make sense given the coding above.



**It's always best to capture a recording of the interview (do ensure you have permission, ideally in writing)**

## Lens 2: Capability assessment.

To answer the question “Why you?” in a way that really lands, you need to know yourself first - your strengths, your weaknesses, and what makes you stand out.

Your value proposition should reflect what you're truly good at. When it's built around your actual capabilities, you're setting yourself up for long-term success instead of overpromising and underdelivering.

At the end of the day, it's about making sure what you offer is both appealing to customers and something your business can consistently deliver. The sweet spot is where your internal strengths meet external demand - because that's what builds trust, credibility, and a lasting competitive edge.

### Talk to your customers.

While conducting your customer interviews as part of the first 'C', use a little of the time you have with them to ask them their perspectives on your organisation. Some simple, open questions that can help you tease out capabilities they see in your organisation, helping you work out why they bought from you:

- **What were the reasons you went with our services instead of someone else? (follow up: Tell me more / Why?)**
- **What are the top 5 strengths our organisation or services have?**
- **What are our top 5 weaknesses, please be honest, no offence will be taken? What can we work on to improve?**

- **How have we helped you and your business do what you need to do?**
- **What have been the results for you/your business?**

These questions are a good start and often you'll hear things you didn't expect, things that aren't on any slide in your sales decks. The magic of talking to customers about your capabilities is you come to understand what they really saw in you rather than what you think they saw.

### Talk to your team.

Incorporating views (via interviews or small group sessions) from sales, account management, support services and product development teams will provide a rounded perspective on your organisation's strengths and potential weaknesses. This feedback should not only reflect current capabilities but also offer a glimpse into future plans or aspirations, ensuring your proposition is both realistic and forward-looking. This means any proposition developed will be realistic today but also be able to link to how the business is evolving.

There is another reason to get perspectives on future capability. Going back to the proposition being a tool to shape strategy and action, having visibility of what is changing in the business will mean any recommendations you make can be positioned in a way that reduces conflict or supports things already in motion. It will also give you the ability to address things earlier that might contradict or impact the success of the proposition rather than having a nasty surprise down the road.

## What we do is commoditised...so, look at the 'HOW'

There is no getting around the fact that the core offer from many B2B providers is very often indistinguishable from competitors and, due to regulation, meet pretty similar standards. So how then do you identify authentic and distinctive capability to use in your proposition if what you do looks like everyone else?

The key here is to go beyond simply collecting information on your product or service features. Through sessions with different parts of the business, you want to go much deeper, not just scratching the surface, to unearth both the tangible and intangible capabilities you offer. This often requires moving away from focusing on the 'what' you do and look more at the 'how' you do it.

To do this, ask a few probing questions in those sessions...

- **How do we do things in ways that others might ignore, miss or see as inefficient but might be effective/compelling to your target customers?**
- **How do we create, build and enhance connections between different parts of the organisation or partners of your organisation in distinctive ways?**

- **How do we make customers feel at different stages of the relationship or engagement? For example, where do you create moments in their journey that continually get great feedback?**

- **Do we see the market we operate in ways that others might disagree with?**

- **How are we structured or organised that can't be replicated by competitors?** *A simple example of this would be how mutual organisations don't have to satisfy quarterly stakeholder returns. This structure means they can potentially invest in things that don't provide immediate commercial return but benefit their customers.*

## Avoid sweeping capability statements.

By moving beyond product or service features to less obvious, intangible capabilities, it can be very easy to fall into the trap of making sweeping, generic, unspecific statements about your capability.

The most common has to be some variation of 'our strength is our people'. Yes, your people aren't replicable commodities, and they are probably great but guess what, all (most) organisations have great people. Therefore, is it really a distinctive thing your customers will recognise? By all means focus on your people (more often than not B2B success is built on relationships) but challenge yourself and the team to dig into what it is about your people and how they operate that's truly special or different.

The other sweeping statement trap we see repeating itself is organisations resting on the history or longevity of their business. There is no denying a 100 year old business has a certain level of credibility in the eyes of customers. That credibility does provide confidence. But in many traditional B2B industries, several of your competitors will have been around for some time too. Being 30 or 100 years old (or much more in the insurance sector) is likely to make little real difference. Does being older or more traditional really make you more appealing today?







Instead, use your origin as a source of inspiration to answer exactly why your heritage is beneficial to customers. For example, a construction company we worked with was the first company to bring a new type of construction plant machine to the UK market from central Europe. From there, they have multiple examples of being the first in the industry to introduce new developments to that product and guide the sector in setting standards. This changes the narrative from being the longest standing provider to the provider that customers know sets the standards of quality and has a long-term ability to innovate.

So really the question is, if you've been around a while, what have you been able to enhance, grow, develop, change in that time that makes you distinctive?

### **Leadership vision and conviction.**

Leadership's vision and commitment are foundational for the successful implementation of any new proposition. Early engagement with company leaders ensures their perspectives are considered, balancing their insights with ground-level realities and customer feedback to shape a proposition that is both ambitious and achievable.

However, a word of caution. Their insight is normally highly opinion-based. As leaders, they're likely to be more detached from the realities of the day-to-day operation and have specific agendas they want to impose. Different leaders will have different perspectives and trying to cram them all into the final proposition is a recipe for a confusing, complex, conflicting output. In other words, a proposition disaster.

The proposition you develop should consider but not be led only by these views.

Your role is to create something that is fact-based, focused on customer insight, and the realities of the business. If this goes against a leader's point of view, it's then your job to show them the insight and use the proposition development process to secure their buy-in.

One thing leader vision does provide is often an exciting 'future' you can tease out or talk to through your proposition. Your proposition shouldn't be a static thing, customers want to feel that you are continuing to innovate in line with it and are taking them on a journey to an exciting place.

### **Capture, code, theme and rank.**

As with customer, for the capability interviews, you will have reams of notes and transcriptions. To make sense of it all go through the coding and theming exercise outlined earlier in this guide (page 11)

Later on in this guide, we'll show you how you'll combine these themes, with your hierarchy of customer needs to identify ways you can message to customers in a way that is compelling and authentic to you.

Incorporating insights on internal capabilities into the value proposition development process, feels like an obvious thing to do but doing it the right way can significantly enhance a company's market position and long-term success. Aligning your unique strengths with customer needs, you create an authentic value proposition that is both compelling and true to you. This approach ensures that the promised value can be consistently delivered, fostering customer trust and loyalty.

The process of integrating internal capability insights into value proposition development is an ongoing journey that requires continuous refinement. As companies evolve and market conditions change, it's essential to regularly reassess internal capabilities and adjust your value proposition accordingly. By maintaining this alignment between internal strengths and external offerings, you'll be more likely to stay ahead of the competition and continue to deliver meaningful value to customers.





### Lens 3: Competitor analysis.

Understanding how competitors position themselves and identifying their strengths/weaknesses through the lens of customer need and pain points is a crucial step in creating a unique value proposition that turns the heads of customers. Often it's the most difficult of the 3 Cs to do as information can be scant.

#### Just use AI...right?

So, it wouldn't be a modern, up-to-date piece of advice if we didn't talk about using AI. It seems that there are a lot of new tools that'll help you very quickly get to some early answers with respect to what your competitors are doing. If you've stumped for ChatGPT Pro at \$200 a month that can do deep research (we're writing this in Feb 2025 so things might have changed by the time you read this), there is a lot of value that can be drawn. But, user beware, Large Language Models (LLMs) can hallucinate information that doesn't exist, even hard data points, so you need to tread carefully.

AI is great and you can use the tools to analyse the information generated in the approaches outlined below but do be careful using it as the sole or even primary source of information.

#### Ask your customers.

The absolute best way to get an un-biased view as to what your competitors stand for and how they perform is to talk to their customers.

Helpfully, your customers are often customers of theirs too or at least have been customers of theirs. They will know who has a more unique value proposition in the market.

During your customer interviews (see the previous section on the customer lens of proposition) you should take time to ask them a few key questions around your competitors.

Questions might include:

- **How else would you solve this need/pain if you didn't use us?**
- **Who else would you use? Why would you/ haven't you?**
- **Who else have you used? Why did you?**
- **Would you use them again? Why/why not?**
- **What are they really good at?**
- **What's the main reason you would use/ buy them?**
- **What are they bad/weak at?**

This will give you a good amount of qualitative insight into what your competitors offer them and their various strengths and weaknesses from a buyer's perspective.

## Talk to your team and to experts.

Another key way to get insights on your competitor is to talk to your team. Now there is a health warning here, this is not an unbiased sample by any stretch but it can provide useful information when used wisely. Talk to your team members how they see the relative strengths and weaknesses between competitor offers.

Some of them will have been previous employees (*DO NOT expect them to divulge any confidential information here please, this will lead you into dangerous territory with the law*) and many will have been customers of theirs. For example, several of our clients in the insurance space have hired employees from their client organisations (the intermediary brokers) who have often bought from competitors themselves and so know first-hand what they're like.

Alongside employees who might have insight into the wider market, seek out independent sector experts and consultants who you can talk to (you might need to pay for their time). Again, people who've often worked supply side, client side, in consultancies who work with several organisations in the sector often know a lot about the different players already. Have we just found a possible positive for consultants? Maybe...

## Explore their collateral

In addition to getting perspectives through the customer interviews and talking to experts (internal and external), it's important to analyse public-facing collateral such as website, social media content, news and event material where available.

Going further, you may also want to capture information on specific partnerships and/or investments competitors are making to indicate their direction of travel and current positioning. Unfortunately, this is not always straightforward and can be a challenge given the realities of a business can be very different to what they project externally. Leveraging the insight from customer interviews along with internal team interviews (especially where the team member may be an ex-employee of the competitor) can be very helpful in cutting through their

marketing fluff to what their real proposition is in the market.

While tricky, the competitor analysis usually offers several potential areas for differentiation, gaps competitors are ignoring, assumptions they are making about the customers they serve and can highlight where your offerings might uniquely address market needs.

While we recommend you try to do a little of this yourself, there is a case for careful use of LLMs (with internet search capability) to speed up the process. Make sure you check their sources to assess the accuracy of the data and the LLMs interpretation and analysis of the data.

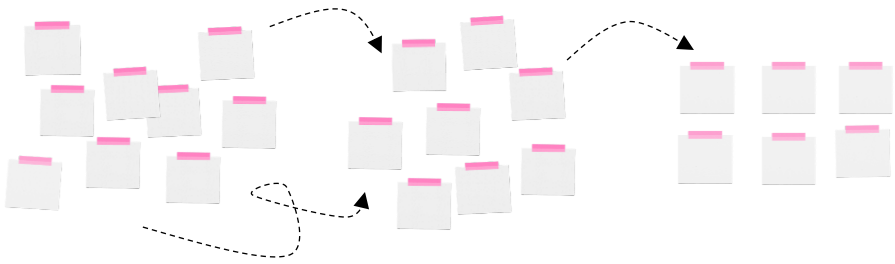
## What's their proposition?

This is where the skill and experience comes into play, it's taking all the information you've gathered from customers, your team, independent experts and from desk research (or your LLM of choice) and distilling it into a market map of the different propositions your competitors offer in the market. It's a view as to the different 'positions' each of them play.

Typically, in any large stable market you'll get some, we're big and global players, whereas some offer different types of 'best value' through feature vs. price combinations, some who position around varying elements of 'quality' and others around specific technologies (anyone say blockchain, big data, AI?). There will also be more nuanced and creative possibilities besides these too.

Your job is to understand the different propositions your competitors are putting into the market and to identify where there might be white space you can occupy as a business or areas where you feel your competitors' position, but they have no right to own that territory. Maybe they have significant weaknesses that you surfaced through talking to customers.

This is where the customer, team and expert interviews come into their own, you can cut through the external collateral they publish and get down to what they're really good and bad at delivering to customers.



## Step 2 Synthesising insights.

So, you've worked through the 3C's and gathered a lot of data around your customers, competitors and your capabilities. Now you need to synthesise that data, across all three lenses in a way that helps you drive out key insights on your proposition. This is the stage in the process where you can gain true clarity and lift the fog on why customers buy from you and why you might edge out the competition.

Before getting into how you can go about converting data into insight, one key warning: don't get fixated on the first thing you learn. It's likely there are different ways you can view the insights that come through, different ways you can package your insights into slightly different propositions. Be open and inquisitive at this stage, allow for the opportunity to learn.

### Synthesis in action.

The synthesis of insights from across the 3Cs lays the groundwork for the creative development of your proposition. Key questions you are looking to answer include:

- **How well do you deliver against your customer needs?**
- **Are there particular strengths (and weaknesses) that you have in high-order need areas for customers?**
- **How do the strengths and weaknesses your customer outlined align (or not) with what internal people have outlined?**
- **How do you, capability-wise, stack up against the competition?**
- **Are there gaps in the market that present opportunities for differentiation?**

There isn't a one-size-fits-all tool or template to use here. Most of the time it requires comparing and contrasting different pieces of insight, exploring relationships, and thinking through the 'so what' in what has been captured. Remember, proposition development, although grounded in insight, requires a significant dose of artistry and creativity.

- **Whiteboard it, don't PPT it:** Capture all insight, big or small, on a whiteboard, use an interactive one if you are a remote or often remote business. We always use Miro (no ad plug here but it's the best tool we have used and we've tried a few) whether we are working as a team physically located or remote. It allows you to revisit content, view everything in one place, organise and reorganise content, and make connections between pieces of insight that may have been captured over a few weeks and/or by different people
- **Make it a team sport:** A Miro board full of information can be a lonely place for one person to navigate. The volume of insight that's gathered using the 3C's framework can be a little overwhelming. Hopefully, it's full of rich commentary, data points, links and visuals from different sources. Therefore, extracting the insights individually before wrangling with it as a team, not only accelerates this step but improves it.
- **Capture ideas as you go:** Don't wait for the next step to generate ideas for your proposition. If you have done well in developing insights across the 3Cs, you should already be generating potential ideas for your proposition. These ideas come naturally as you capture and synthesise the information. Make sure you have a place on your whiteboard to capture these for later.



### A simple process to go from data to insights:

- **Data to Observations:** As you review the data you have captured, what do you takeaway from it as you read? What emerges from the raw data that makes you think or plants ideas into your head? Add post-its in a different colour so you know what's raw data vs. an observation you've made about the data.
- **Observations to Themes:** What groups of observations or clusters and themes are you seeing come through as you learn? Grab (or copy) those observation post-its and place them in areas where you can start to cluster them around similar concepts and ideas.
- **Themes to Insights:** Critically assess each of the themes, clusters and remaining individual observations. Think about the 'So What' for each, how are these meaningful to you and your customers, what are the implications to all stakeholders?

### Sharing insights across the organisation.

An essential final step in this phase is to share the gathered insights with contributors across the organisation. This ensures that all stakeholders feel heard and onboard before you get into the development of the proposition. It also allows you to review and fill any gaps you might have before starting Phase 2

Again, capture proposition ideas that come from these conversations. You and the working team aren't the only people with good ideas, and more ideas from more people always improves the chances of landing on something great.



**Ensure that all stakeholders feel heard and onboard before you get into the development of the proposition.**



### A powerful tip to guarantee an AHA! moment with the insight.

One of the most valuable things you can do during the insight phase is to highlight any gaps between what customers actually value and what your team thinks they value. Or, put simply, the difference between what you believe you're great at and what customers actually see.

Spotting these disconnects can be a game-changer. It helps teams challenge assumptions, get to the heart of what really matters to customers, and adjust their approach accordingly.

When sharing insights across the business, don't just present the findings - call out these gaps, talk about what they mean, and use them to spark conversations about how to refine your proposition.



## Phase 2

**Design, iterate and  
validate your proposition.**

Through the first phase, you have built a solid and robust base through talking to customers, reviewing competitors and assessing your own capability strengths and weaknesses (3Cs). You've synthesised all of this rich data into insights that will drive your proposition messaging. Now is the time to turn insight into stories, developing a perfect proposition.



## Step 1

### Your initial proposition(s).

Starting with the insights gathered in the synthesis stage, you'll now review and use them as inspiration for new ideas for your proposition. Use the opportunity to ideate (creatively generate or brainstorm) several different options that might form the lead messaging. Your insights will have already surfaced several things you can say about your business or product, but don't just be led by these. Now is the time to think a little more indirectly at the challenge and come up with new ideas.

Think about the different ways you could position and address the needs of your target customer given what you now know.

Here's some questions we use to prompt your thinking:

- **What need do we deliver extremely well on that customers say they come to us for? Can this be the lead of our proposition?**
- **Can we cluster a couple of similar customer needs (that we deliver well on) that we can position around in a new, slightly different or less 'common' way?**

- **How would we position into the whitespace identified in our competitor lens? If we leant into this space, would it address key customer needs?** (TIP: Don't do this if the whitespace matches a gap in customer needs – there is not likely to be a market. They are gaps for a reason.)
- **What needs, if we delivered slightly better on in the near future, would open up a new way of talking about ourselves?**
- **How is all of this articulated in the language of benefits to your customer?**

Use these questions along with all the insight you've gathered to generate several ideas for your proposition. At this stage don't pre-judge, remember quantity over quality as you come up with ideas.

Once you have a bank of ideas you can use the same cluster and theming step we outlined in a previous stage to remove duplicates or cluster supporting ideas into new combinations. This will give you a list of potential options.



**DO BE CAREFUL about over-clustering. Many try to cram all the interesting ideas into one 'mega-proposition'.**

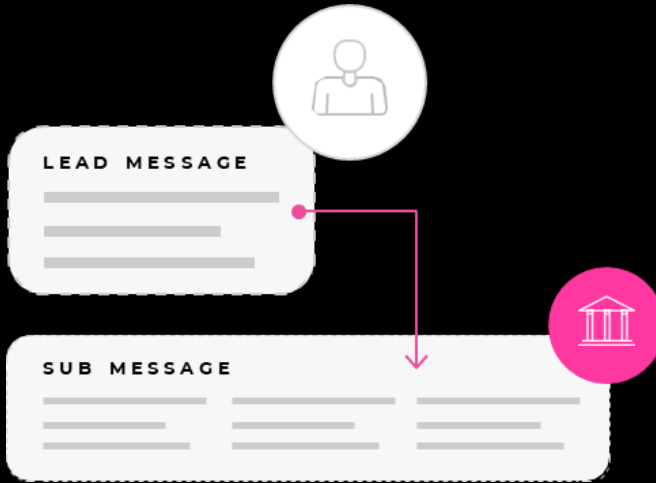
### How do you know if it's a separate option?

Each proposition option you cluster should clearly articulate why your target customers should choose your offerings over others.

Let's say you're targeting high-growth start-ups, and your strength is top-tier customer service with more capacity than the competition. You could position your offering in two very different ways. One approach is to highlight speed and agility - showing startups that your service can keep up with their fast-moving, ever-changing growth. Another angle is to focus on stability. Startups face a high risk of failure, so instead of just promising support when things are going well, you could emphasise the reassurance that you'll still be there when their entrepreneurial challenges inevitably arise. Both approaches address real customer needs, but they tell two very different stories.

Another acid test for having different options is to ask yourself (and the team), would each option lead to a different position in the mind's eye of the customer, would they lead to different marketing messages, and would each option drive different actions internally to execute the proposition? If the answer is yes to these questions, you likely have different options rather than different versions of the same option.





At this stage, it is a simple 1-page articulation (keep it simple, just copy no pictures), to outline:

- **The lead message** – articulate the core idea of your proposition in a short statement explaining who you help [*Target Customer*], with what need or problem [*Need*], in a way that is unique or distinctive to you [*Capability*], to deliver tangible benefits to the customer [*Outcome*]. Think of this as the foundation for THE thing you want people to remember you for if this was your proposition in the market today. Use clear, practical, to-the- point language, not clever marketing speak or buzzwords. That can come later although we would encourage avoiding this even at the 'creative execution' stage.
- **Sub-messages (or pillars)** - the distinctive elements you want to deliver as part of this proposition. These should be aligned with the critical customer needs you are addressing, and the benefits customers will realise by using you. At this stage, you may also want to capture some high-level capabilities that demonstrate how you deliver this better than others.

#### Recommended Reading –

##### Beyond Taglines:

What is a proposition statement & why will it make or break your business?



**Remember, the objective for now is to create a proposition that will then inform future marketing creative and sales collateral. We aren't creating those things yet.**





### One or many? Is there such a thing as a perfect proposition?

As mentioned, this is the messiest step in the whole process. If you are lucky, it may be obvious what the proposition is from the insight you gathered. This is rare. Most of the time, you'll find numerous directions the business can take. **We tend to worry if there is only one (have we thought about this hard enough?) or if there are too many options (more than 5, are they detailed enough or distinct enough?).**

If it's the former, stretch your thinking. Maybe bring in 2 or 3 more people to help you develop new ideas or ways of looking at the proposition. If it's the latter, look at where overlaps and duplications exist. Are they really different options or just a slightly different way of articulating it? Dedupe, rewrite until you have a manageable number of options.

### Take your time.

As this activity is the least formulaic step, it can vary in length to complete. Our advice, give it time, consider the insight from different angles, and get other perspectives. And just like with insight synthesis, ideally this is not a one-person job.

Once complete you now have a set of 2-5 proposition options articulated. All are still in the early thinking stage but are now formed enough to test and validate both internally and externally.

**Think in terms of a tree** – use a tree diagram to map out your messaging for each proposition. Sometimes this is called a 'messaging house'.

Be bold and have the courage to choose ONE overarching umbrella message for the business unit / service line / product. Then select no less than 3 and no more than 5 'core messages' or pillars that deliver the key points you want to land in the eyes of customers and that ladder up to the umbrella statement. It's these pillars that you support with the proof points gathered when talking to customers and exploring capability within the organisation.



**As this activity is the least formulaic step, it can vary in length to complete.**

## Step 2

### Customer desirability testing.

Validating your proposition options with a small group of target customers will provide critical insights into the proposition's relevance to them and the differentiation they see to the rest of the market. Here you want to try and reconnect with 3-5 customers from the first phase, talk through the options you have and get them to share their thoughts:

- **Which option resonates the most (and why)**
- **Which options don't?**
- **What option feels like it would be delivered well by your organisation?**
- **What option feels like it should be delivered by another player?**
- **What would they add, remove or improve to make it more compelling?**

“

**At this stage, try to avoid cosmetic wordsmithing...It's about testing the core concept of the proposition and the pillars you will focus on.**

At this stage, try to avoid cosmetics and overly wordsmithing. It's about testing the core concept of the proposition and the pillars you will focus on. It's your opportunity to refine and evolve the proposition with the opinion of what matters most, your target customer.

Can you get to the heart of why MANY customers buy from you? I use 'many' very specifically, you'll always find examples of other reasons customers buy from you. If we try to squeeze in every reason possible, you'll end up with a very generic proposition – “we make cars for people who drive cars.”



### Step 3

## Assessing and ensuring delivery capabilities (feasibility and viability).

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Alongside getting feedback from customers on desirability, use the time with them to get their view on your organisation's ability to deliver on the promises made in your proposition. Identify any gaps in capabilities that they see or have experienced that may prevent the proposition/s being delivered.

In addition, this is the point to bring your internal contributors back into the process. Again, this can be through small group or 1:1 sessions. It's an opportunity to test the proposition options with them to get their immediate reactions. You can also gather their feedback on how easily they think each option will be delivered and what might have to change within the organisation to meet the promises made. Capture those ideas and challenges, they are the ingredients for the draft roadmap and plan in Phase 3.



**Re-engage your stakeholder group to playback the feedback and show an assessment of each option using a customer, capability and competitor lens.**

### Step 4

## Prioritisation (if required).

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This is now the time we look to prioritise. Often this can be very clear from the insight, often you can get a very strong steer from customers in your validation testing BUT... not always. Sometimes you'll still have 2 or 3 options that make sense, deliver well against strongly felt needs and tested well. This is the time you earn your salary as leaders of your organisation.

Working with the proposition owners, this might be an individual but usually it's a small team. For brand level proposition work, it can be the whole executive team. Who ever the team/individual is making the decision there are a range of tools and techniques available but above all the key is not to try and make it feel falsely scientific.

At this stage, even though we've talked about the 'perfect proposition' there are often no right or wrong answers, all the options you have will likely resonate well with more than enough customers to grow your business. Perfect for you and your business is also about choosing the route that makes sense to you and your team, the route you believe in.

You're going to be delivering and working on the proposition for a few years to come, so it needs to be something you are happy with. A couple of tools or methods we have used with a lot of success is pairwise ranking if making

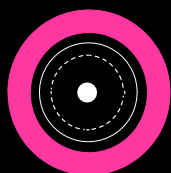
decisions within a small team or bubble sort if making decisions within a larger group like an executive team.

A final watch out here, don't just smash all options together. Although parts of propositions can be combined, don't be tempted to bundle everything together to appeal to everyone. This activity really is about clarity of choice given everything that has been learnt and explored. Trying to satisfy everyone by creating a monster 'one proposition to rule them all' usually means complexity, confusion and a proposition that is likely to appeal to no one.

### Proposition to delivery.

So now you have it, the perfect proposition for your business. One that you are confident will resonate with customer, one that somewhat unique in the market and one that you can authentically deliver as a business and believe in as a leadership team.

At this stage you have a high-level value proposition statement and ideas for the propositional pillars, the next stage is fleshing them out, building in evidence and outlining a roadmap to implement in your marketing and sales efforts as well as improve product and service delivery.



### **Phase 3**

**Produce, plan to deliver  
and engage.**

You're now clear on the proposition itself, having based it on real insight along with the rationale to support the decisions made. This phase is where you'll flesh the proposition out and build a roadmap to implement and evolve it.

Fully articulating and documenting the proposition blueprint is an important first step so you have a 'single source' of the truth you can refer to when making decisions in the future. Developing a roadmap for implementing it and showing how it can evolve into the future means that it doesn't just end up as a PowerPoint in the marketing team SharePoint. In this phase you'll work across the business to begin executing the promise.

## Step 1

### Flesh out the proposition.

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The first step in proposition implementation is to ensure you have fully fleshed out the proposition. A full proposition house/hierarchy is a useful tool for several parts of the business. For Marketing, it forms the starting 'messaging house'. For Sales, it provides prioritisation in the narrative you deliver buyers across the sales funnel. For Product and Service, it provides strong steer on the pillars of the overall offer, allowing them to make decisions on touchpoint improvements and feature enhancements.

At this stage, if you didn't do this fully in the design stage, it's time to craft your value proposition statement; the highest level of narrative/messaging you'll have. It's a very concise and clear articulation of who you are for, what you do for them and the benefits they will accomplish, the 'why'.

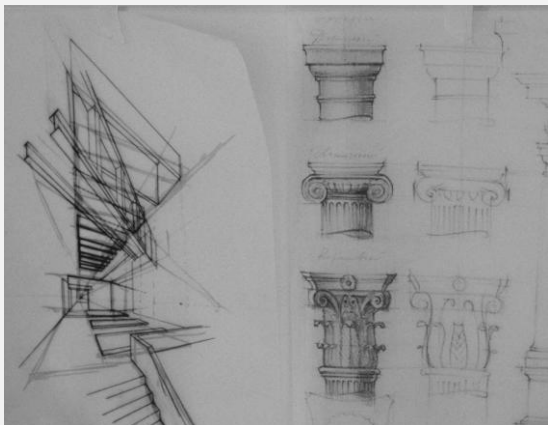
Next you need to build out the pillars of the proposition. You may have chosen your pillars in the design stage but now is time to add to them. These are the building blocks for your business going forward. What are the three to five things you are going to do or be known for to deliver the overarching proposition value statement?



**What are the three to five things you are going to do or be known for to deliver the overarching proposition value statement?**

How will you articulate them so they can be both used for campaigns and helpfully direct activity in the business?

Finally, adding evidence and reasons to believe to the proposition hierarchy so we build internal confidence and provide sales and marketing proof points for messaging.



## Step 2

### Go-to-market plan and proposition roadmap.

This is now where you're ready to build out the go to market plan and the proposition roadmap. The former is where you evaluate how you will develop and launch the customer facing side of the proposition, delivering sales and marketing collateral to customers and cementing the new proposition in their minds.

Along with the launch activity, it's likely your chosen proposition will require improvements to be made in the business in order to truly live up to it. This is usually the case unless you've chosen a very safe, deliverable proposition that's unlikely to shift the dial with customers. Assuming that's not the case, a key step is identifying areas to improve, in line with the core pillars identified above, so you can truly deliver the proposition well for customers.

We'll tend to identify key activities that enhance the proposition and help the team deliver it well over the short, medium and long term. This is where, again, we're linking back in with the business or business unit strategy.

It is vitally important that this is built with the team and leadership together. Without leadership buy-in it's likely to remain just words on a page. Bringing key stakeholders into a working session to further develop a strawman 'plan' you've developed beforehand is usually the best way to do it. This means you're not starting from scratch in the room and gives team members the forum to challenge, add and remove activities.

The key here is to focus on the areas and activities that will have the biggest impact. This is all within the strategic and operational constraints you/the team/business has. What can you, your team and your stakeholders do to better deliver the proposition and the key proposition pillars that sit within it?

Don't be tempted to see it as an opportunity to cram everything into the backlog.

This is an opportunity to use your proposition and pillars to say no to things. There is always, as you well know, an endless list of things you can do to improve your business, this is an opportunity to prioritise what you want to be good at and to be known for.

Use your proposition to guide that. Be mindful that 'fixing the basics' (the excuse people use for not tackling the harder things that you'll become known for) will never end.

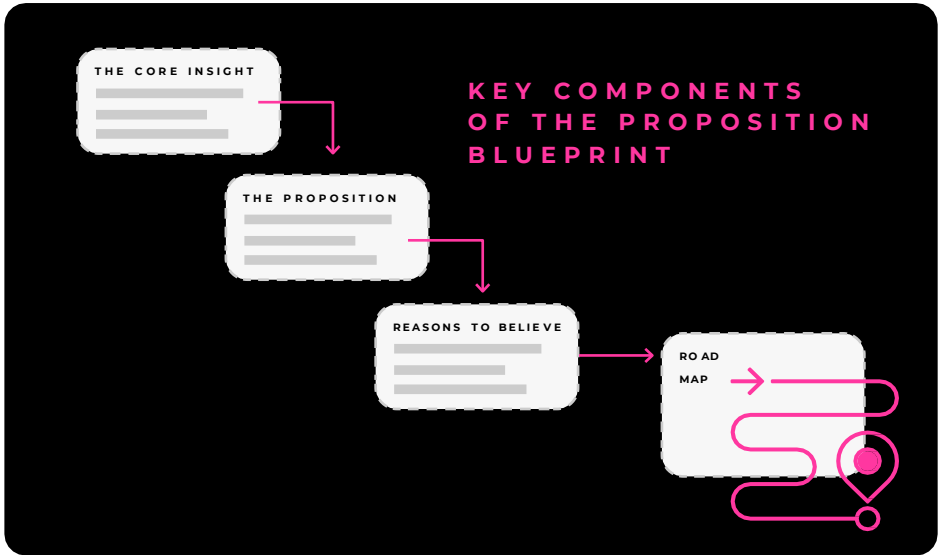
Obviously, if there are fundamental gaps or weaknesses compared to your desired proposition, you should look to improve them but don't just focus on the weaknesses. Often improving your strengths further is how you really cement your business in the mind of your customers and build a 'moat' around what you do. Seek to make your strengths so unassailable that the competition can't keep up.

#### Building the plan.

No need for an overly complex Gantt chart at this stage. Breaking activities into 'areas' such as marketing, sales, product or team and into stages such as short (<6mth), mid (6-18mth) and long (>18mth) term buckets will provide enough detail.







### Step 3

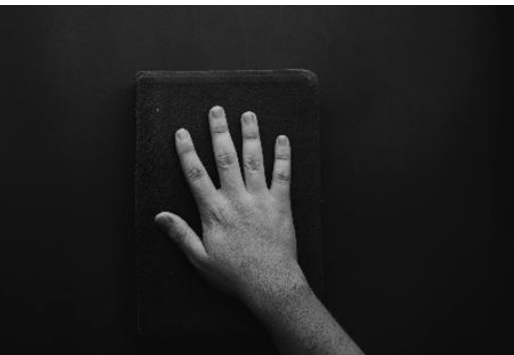
## Building the blueprint.

You have your proposition and a plan to develop it, now you'll document it in a way that can be communicated and implemented across the organisation. This might require a few rounds of iteration potentially dipping back into activities in the design stage.

It's that single source of truth. An internal document to explain exactly what the proposition is, how it was developed, and why it's the right proposition for your business.

#### It articulates:

- **The core insight** – the evidence that led to the chosen proposition from the 3C's insight base you have built
- **The Proposition** – a clear, succinct articulation of the lead message and proposition components/pillars. These are the promises and focus areas you are committing to deliver in a way that's better, different or distinctive to the competition.
- **Reasons to believe** – real capabilities and initiatives that support the proposition pillars. These are usually the tangible things that customers see, feel and engage with.
- **Roadmap** – visually outlining the roadmap and GTM plan outlined in in Step 2.



## Step 4

### Sharing the proposition.

Now that the proposition has been developed, the wider business needs to be taken through it. This provides clarity for everyone involved on how the organisation will present itself going forward. While you make have involved many in the organisation during the development of the proposition, there are more stakeholders who will need to be made aware of it, the messaging and how they can apply it.



**It's important to identify ways in which feedback from these actions and engagements can be used to further sharpen and improve your proposition.**

## Step 5 (ongoing)

### Iteration vs consistency.

Your proposition isn't a one-and-done exercise. You can't set it and review in 3 years. Evolving your proposition should be an iterative process and just as you will have done with this process, it's vital to put insight (especially from the customer) at the front and centre of this iteration. As you start to execute the proposition through the things you do, the marketing collateral you deliver and the sales conversations the business has, it's important to identify ways in which feedback from these actions and engagements can be used to further sharpen and improve your proposition. This can be through short spot surveys, follow questions to customers after a sale is made (or not) or simply getting your team members on the front line to share what they've found resonates and importantly, what doesn't land as well after any customer interactions they have.

## Call for consistency.

Although your proposition will evolve, it is also important to stress the need for consistency and patience. Time will be required for it to bed in. Internally, people need to familiarise themselves with what it is and how it impacts what they do and say. Externally, it's going to take time to gain traction unless you have the luxury of bottomless pockets to shout about it through your marketing execution.

It can be easy to make kneejerk reactions based on one or two negative comments (mainly from people who are used to talking the old way) and make a significant pivot based on opinion. We've all been there. However, if you put trust in this process and the insight you gathered, you can help the business understand why the proposition decided on is the right one to stick with and build on.





# There you have it...

## ...time to get going?

**Developing a compelling proposition is a strategic imperative for complex B2B organisations looking to differentiate themselves in a competitive market.**

By following the structured approach outlined in this guide, B2B marketers can lead their organisations in crafting propositions that resonate with customers, drive strategic alignment and support sustainable growth.

Remember, although this initial approach can be executed by a small team in 6-10 weeks, successful proposition development is not a one-time effort. The needs of customers change, capabilities evolve, and people come and go. This should be viewed as the first deliberate step. Under your ownership and guidance, it can be iterated, refined and improved, pushing your organisation to become more distinctive, interesting and ultimately, more attractive to the customers your business wants.

### **Where are you now?**

Before you get going, it can be helpful to know what you're starting point is. By scanning the code below, you can use our **Proposition Calculator** to quickly evaluate the how effective your proposition is compared to industry standards.

It will provide you with a score and the option to receive insights into your proposition's strengths and the areas that may need a little work.



## Chat to our team.

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If you're looking for a little support from a team that has built propositions for companies of all shapes and sizes or simply want to chat about the details of this approach, please give us a shout via email or book one of our free drop-in sessions by scanning the QR code.

E: [findlay.guerin@stratinn.co.uk](mailto:findlay.guerin@stratinn.co.uk)

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**Book a drop-in call.**