

# LEARN Go-To Market Playbook



This playbook provides a step-by-step approach to launching and scaling your educational product, with a market-first mindset. It provides a process and corresponding frameworks and exercises to help you build and execute against a go-to-market (GTM) strategy that supports your scaling goals.

- **How to use:** The playbook offers a step-by-step process to build and execute a GTM strategy and plan that is rooted in the needs of your target audiences and the value your innovation provides. Each step informs the next, ultimately helping you build and activate externally facing marketing and user engagement initiatives.
- **When to use:** After you have determined your scaling goals and are ready to begin building or expanding awareness of your innovation and bringing your product to market.

## LEARN to Scale Toolkit

This playbook is part of the LEARN to Scale Toolkit. The toolkit is designed to support researchers and developers in using the Invent-Apply-Transition framework to create, test, and scale evidence-based educational products. Access the full toolkit at [learntoscale.org](https://learntoscale.org).

## Build a GTM Strategy to Support Scaling Goals

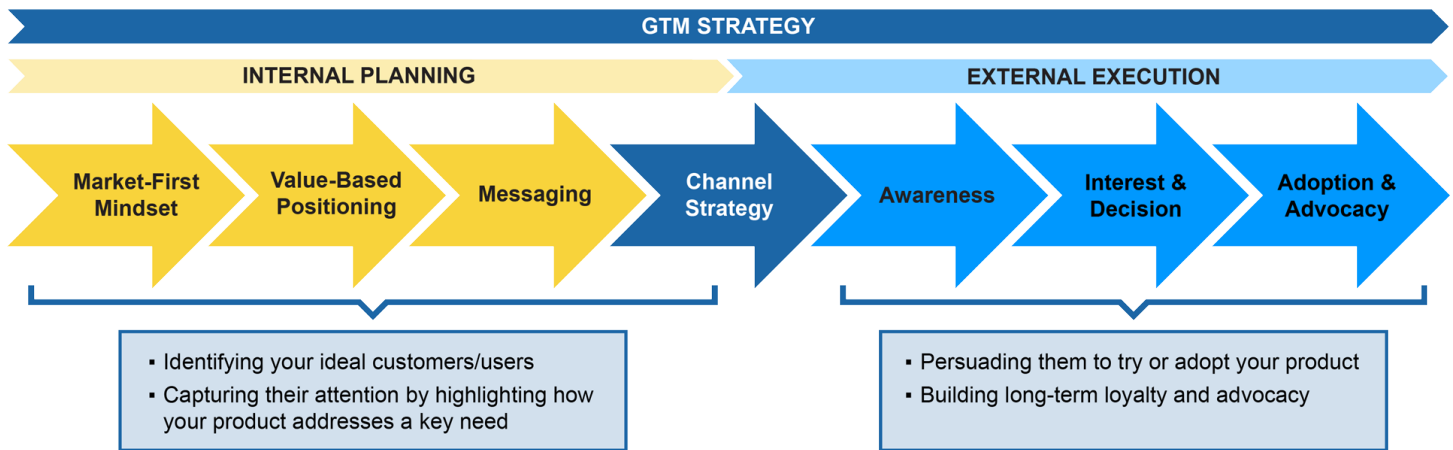
A GTM strategy is a focused plan for launching a product or service to the right audience. Its purpose is to connect with target customers and encourage them to adopt or buy what you are offering. Essentially, it is a roadmap that guides your path to market—from building awareness and generating interest to converting prospects into customers and turning them into advocates. Put simply, your GTM strategy is about:

1. Identifying your ideal customers and users.
2. Capturing their attention by highlighting how your product addresses a key need.
3. Persuading them to try or purchase your product.
4. Building long-term loyalty and advocacy among your customers and users.

The playbook was developed in partnership with Julie Kelleher, Kelleher Consulting Group. Frameworks and exercises adapted with permission from Julie Kelleher, Kelleher Consulting Group, Original content © 2024.

# Seven Steps for Building A GTM Strategy

The seven key steps of a GTM strategy follow a sequential process from internal to external activities.



The internal steps are fundamental to a market-focused, audience-centric approach. This groundwork helps avoid costly missteps and ensures resources are used efficiently, driving a higher return on investment in marketing and business development efforts.

## Contents

This GTM Playbook is intended to guide you through the initial internal steps to ensure the greatest return on your investments in external marketing and business development activities.

<p><b>Build a Market-First Mindset with ICP &amp; ICA</b></p>	<p>Building a GTM strategy based on your Ideal Customer Profile (ICP, or organizations best suited to adopt your product) and your Ideal Customer Avatar (ICA, or individuals or target audiences within that organization) requires having a market-first mindset. Understanding your target market, target audiences, and the competition are essential inputs to cultivating this mindset.</p> <p><i>Step-by-step process:</i> <a href="#">Build a Market-First Mindset with ICP and ICA</a></p>
<p><b>Connect with Value-Based Positioning</b></p>	<p>Developing value-based positioning helps ensure your product stands out in the minds of your target audiences. Value-based positioning is:</p> <ul style="list-style-type: none"> <li>Audience-centric / ICP-centric and ICA-centric</li> <li>Differentiated</li> <li>Defensible (based on your capabilities and features)</li> </ul> <p><i>Step-by-step process:</i> <a href="#">Connect with Value-Based Positioning</a></p>



<b>Craft Your Messaging</b>	<p>Speaking directly to your target audiences (ICP and ICA) is most effective with messaging rooted in value-based positioning. Such messaging should:</p> <ul style="list-style-type: none"><li>▪ Focus on benefits, not just features</li><li>▪ Differentiate from competitors with the unique value you provide</li><li>▪ Address specific pain points of your ICP</li><li>▪ Have audience-centric language, context, and tone</li></ul> <p><i>Step-by-step process:</i> <a href="#">Craft Your Messaging</a></p>
<b>Define a Multichannel Marketing Strategy</b>	<p>Finding where to speak to your target audiences (ICP and ICA) requires reaching them on their preferred platforms. The key is being where your customers already are. Start small and choose 3–4 marketing channels so you can reach them in multiple ways (social media, email, website, ads).</p> <p><i>Step-by-step process:</i> <a href="#">Define a Multichannel Marketing Strategy</a></p>
<b>Activate Awareness</b>	<p>Activating your multichannel strategy is the first step to getting noticed. Examples include:</p> <ul style="list-style-type: none"><li>▪ Creating engaging content (blogs, videos, infographics) focused on your target audiences (ICP and ICA)</li><li>▪ Engaging through social media (regular posting, engaging with audience)</li><li>▪ Collaborating with influencers</li><li>▪ Email marketing</li></ul>
<b>Drive Interest and Decision</b>	<p>Driving interest and decision requires ongoing engagement, such as a conversation with those who noticed you and your product. Give them reasons to engage with you and your product. For example:</p> <ul style="list-style-type: none"><li>▪ Offer something valuable (e.g., free trial, ebook, consultation)</li><li>▪ Provide case studies and testimonials</li><li>▪ Develop comparison guides to highlight differences from alternatives</li></ul>
<b>Grow Adoption and Advocacy</b>	<p>Growing adoption and advocacy involves turning your existing customers into loyal users who not only stick with your product but also actively champion it to others. Strategies include:</p> <ul style="list-style-type: none"><li>▪ Onboarding programs</li><li>▪ Ongoing incremental value-adds</li><li>▪ Customer communities</li></ul>



## Build a Market-First Mindset with ICP and ICA

Truly knowing your target audiences allows you to create a product and messaging that speaks directly to their needs, challenges, and goals. A deep understanding of your audiences leads to better customer alignment, more meaningful engagement, and increased loyalty over time. This starts by identifying attributes of your ideal customers (ICP) at the organization level as well as at the individual, persona, or role level (ICA).

Defining your ICP and your ICA is essential to your GTM strategy. In marketing and sales, ICP and ICA refer to the process of clearly defining who the best-fit customers are to inform the GTM strategy. This process will help you focus your marketing and sales efforts on the most valuable customers. ICP and ICA are complementary but distinct concepts:

- **Ideal Customer Profile (profile level):** Defines the type of company or organization that would benefit most from your product or service.
- **Ideal Customer Avatar (persona level):** Focuses on the individual decision-makers (or key players), implementers, and end users within your ICP and their specific needs, goals, and behaviors.

This section provides a five-step guide to defining your ICP and ICA, providing you with the foundational inputs for a market-centric GTM strategy.

### Step 1: Build Your ICP: Organization Level

An ICP is a description of the best-fit company or organization for your product or service. It helps you identify which companies are the most likely to need your solution, benefit from it, and become profitable long-term customers.

Start by analyzing either your current customer base (if you have one) or the potential market. Using the table below, focus on the key attributes and considerations to identify where the most opportunities lie. Then, use the worksheet following the table to record your ideas. This information will form your **ICP**, a foundational element of your GTM strategy.



## Key ICP Attributes, Considerations, and Examples

Attribute	Considerations	Example
<b>Industry/ Vertical</b>	Which industries do you serve best (e.g., education, healthcare, software as a service)?	Education
<b>Organization Type</b>	What type of organization do you serve best (e.g., for-profit, governmental, educational, nonprofit)?	Education, K–12
<b>Organization Size</b>	What size of organization (e.g., in terms of budget, revenue, number of employees, number of students) aligns with your solution?	Medium-large (2,000 students or larger)
<b>Revenue / Annual Budget</b>	What financial resources do these organizations need to make purchasing your product realistic?	Annual budget of \$30 million or higher
<b>Geography</b>	Are you targeting organizations in specific geographic areas or regions?	U.S.
<b>Technology</b>	What technologies are commonly used in these organizations?	Learning management system, student information system, rostering tool
<b>Pain Points / Needs</b>	What challenges are these companies facing that your product can solve?	Reading intervention for students in grades 3–8



## Worksheet: Key ICP Attributes

Complete the worksheet below based on the key attributes and considerations above.

Attribute	Top Characteristics
<b>Industry/Vertical</b>	
<b>Organization Type</b>	
<b>Organization Size</b>	
<b>Revenue / Annual Budget</b>	
<b>Geography</b>	
<b>Technology</b>	
<b>Pain Points / Needs</b>	



## Step 2: Build Your ICA: Persona Level

An ICA zeroes in on the specific individuals, personas, or roles within your target companies or organizations who will use or purchase your product. These avatars or personas represent the key decision-makers, implementers, users, or influencers involved in the buying process.

Using your definitions from Step 1 and the key attributes and considerations in the table below, now identify the key roles at your ideal company or organization. Then, use the worksheet following the table to record your ideas. This information will form your ICA, another foundational element of your GTM strategy.

### Key ICA Attributes, Considerations, and Examples

Attribute	Considerations	Example
<b>Job Title and Role</b>	What position does the person hold (e.g., principal, head of marketing, chancellor)?	Middle School Principal
<b>Demographics</b>	What age, education, years of experience, and other relevant personal details does this person have?	45+ with 20+ years of experience
<b>Goals and Objectives</b>	What does this person need to achieve to be successful in their role?	Student attendance, achievement, and teacher retention
<b>Pain Points</b>	What specific frustrations does this person experience that your product can solve?	Low reading scores for students in grades 6–8
<b>Decision-Making Power</b>	Is this person the final decision-maker, influencer, or user?	Decision-maker
<b>Buying Motivations</b>	What drives their purchasing decisions (e.g., efficiency, cost savings, outcomes)?	Outcomes
<b>Preferred Communication Channels</b>	Do they prefer email, LinkedIn messages, or phone calls?	Email



## Worksheet: Key ICA Attributes

Complete the worksheet below based on the key attributes and considerations above.

Attribute	Considerations
<b>Job Title and Role</b>	
<b>Demographics</b>	
<b>Goals and Objectives</b>	
<b>Pain Points</b>	
<b>Decision-Making Power</b>	
<b>Buying Motivations</b>	
<b>Preferred Communication Channels</b>	

**Why It is Important:** ICAs, or customer personas, help your sales and marketing teams craft targeted messaging that speaks directly to the needs and goals of individual buyers and influencers. ICAs also guide content creation by ensuring your outbound efforts (emails, blogs, webinars, social media, etc.) resonate with the right people at the right time.





# Step 3: Create an ICP Narrative for Internal Alignment

Now that you have defined your **ICP and ICA**, you need to communicate this information in clear and actionable terms. This makes it easier for marketing, sales, and product teams to adopt a unified approach, ensuring they are all on the same page. Steps 3 and 4 include templates to help you communicate your ICP and ICA clearly across teams.

## Example Narrative for Your ICP (Education Focus)

<b>ICP Template</b>	At <b>[Your Organization]</b> , our ideal customer is a <b>[organization size] [organization type]</b> in the <b>[industry type]</b> industry. These organizations typically have an annual budget of <b>[budget range]</b> and are based in <b>[geography]</b> . Our solution is particularly valuable for companies using <b>[tech stack]</b> , as it helps them <b>[address specific problem]</b> more effectively.
<b>Example</b>	At <b>ABC Developers</b> , our ideal customer is a <b>mid-sized K–12 school district</b> in the <b>education</b> industry. These organizations typically have an annual budget of <b>\$30 million</b> or more and are based in <b>urban and suburban areas of the U.S.</b> Our solution is particularly valuable for companies using <b>Canvas LMS and PowerSchool SIS</b> , as it helps them measure <b>reading progress</b> more effectively.

## Template: Complete Your ICP Narrative for Internal Alignment

<b>ICP Narrative</b>	
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## Step 4: Create an ICA Narrative for Internal Alignment

Building on the previous example of an ICP narrative, the similar template for an ICA narrative below will help you ensure alignment around target personas.

<b>ICA Template</b>	The <b>[ICA – Decision-Maker]</b> cares about <b>[strategic priorities]</b> , but <b>[challenges]</b> stand in their way. With our <b>[product or service name]</b> , they will be able to <b>[benefit]</b> because <b>[distinction or why]</b> .
<b>Example</b>	The <b>Middle School Principal</b> cares about <b>improving learning outcomes and retaining quality teachers</b> , but <b>burnout, limited resources, and high teacher turnover</b> stand in her way. With our <b>ABC Literacy program</b> , she will be able to <b>offer targeted literacy support that lightens teacher workloads and accelerates student progress</b> because our research-backed program is proven to be <b>effective with students in grades 6–8</b> .

### Template: Complete Your ICA Narrative for Internal Alignment

<b>ICA Narrative</b>	
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#### AI Insights for ICP and ICA Validation

*AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help define your ICP and ICA and their challenges and interests. Customize and paste the prompts into ChatGPT (or another AI tool) for a clearer understanding of your ICP and ICA and to narrow down who you are targeting in your GTM efforts.*

<b>ICP</b>	<b>AI prompt:</b> Help define my Ideal Customer Profile for a <b>[insert what your product is]</b> . <b>Example:</b> Help define my Ideal Customer Profile for a <b>reading intervention product</b> .
<b>ICA</b>	<b>AI prompt:</b> What challenges/struggles do <b>[insert one of your ICA roles]</b> face when <b>[insert what your product helps people do]</b> ? <b>Example:</b> What are <b>5 struggles</b> that middle school principals face related to reading?



## Step 5: Activate, Measure, and Refine Your ICP and ICA

Once you have defined your ICP and ICA, the next step is to **activate them** across the entire buyer journey—from awareness to purchase. This is where your ICP and ICA move from theory to practice, guiding how you engage with potential customers.

Activation of your ICP and ICA happens in a unified GTM strategy, ensuring a shared understanding and approach to targeting across marketing, sales, and partnership channels.

**When to review and refine your ICP or ICA:** Your ICP and ICA are not static—they should evolve as your business grows and you gain more data. You may need to adjust your ICP or ICA in these example scenarios:

- **Your product enters new markets:** When you expand your reach geographically (e.g., outside of the U.S.) or target new industries (e.g., from K–12 to corporate learning).
- **You offer a new or expanded product:** For example, when a new set of features are added to your product or you offer a new service.
- **The landscape shifts:** When shifts in policy or funding impact your ICP or ICA or shifts in competition occur (e.g., a competitor is winning over a persona you did not historically target).

Adjust your ICP and ICA as needed to continuously improve targeting and efficiency.

### ICP and ICA: The Key to a Market-First GTM Strategy

Your ICP and ICA are more than just marketing tools—they are the cornerstone of your business strategy. By focusing on the customers who are the best fit for your product, you can drive greater efficiency, increase your chances of success, and develop a robust GTM strategy with your ICP and ICA at the forefront. Additionally, staying focused on customers with shared ICP and ICA attributes can help you streamline internal operations, improve customer retention, and scale more effectively. Remember, as your business evolves, so should your ICP and ICA, ensuring that your strategy remains aligned with your growth goals.



# Connect with Value-Based Positioning

Value-based positioning is a foundational component of how you bring your product to market. It helps you communicate your product’s real-world impact by focusing on the outcomes that matter most to your target audiences. Instead of only listing features, value-based positioning shows how your product solves key problems, saves time, and delivers meaningful results. This approach creates messaging that resonates with customers, builds trust, and motivates action—setting your product apart in a crowded market.

Developing value-based positioning for your product helps ensure that it stands out in the minds of your target audiences. This is an essential first step to a market-centric and audience-centric approach to how you go to market. Overlooking or skipping this step is often the root cause of messaging misalignment.

Value-based positioning is important because:

- It is the strategic foundation for where you want your brand to stand in your customers’ and users’ minds, relative to your competitor’s brand.
- It is rooted in your competitive niche or wedge, compared to the competition, and it sets the tone for how you want your existing and future customers or users to perceive what they will get by choosing you.
- It is an essential first step to ensuring that your messaging does not get lost in a sea of sameness and sound like everyone else or, even worse, that your messaging is not focused on what your target audiences need and want.

The table below illustrates a common framework for thinking about the structure of value-based positioning for your product.

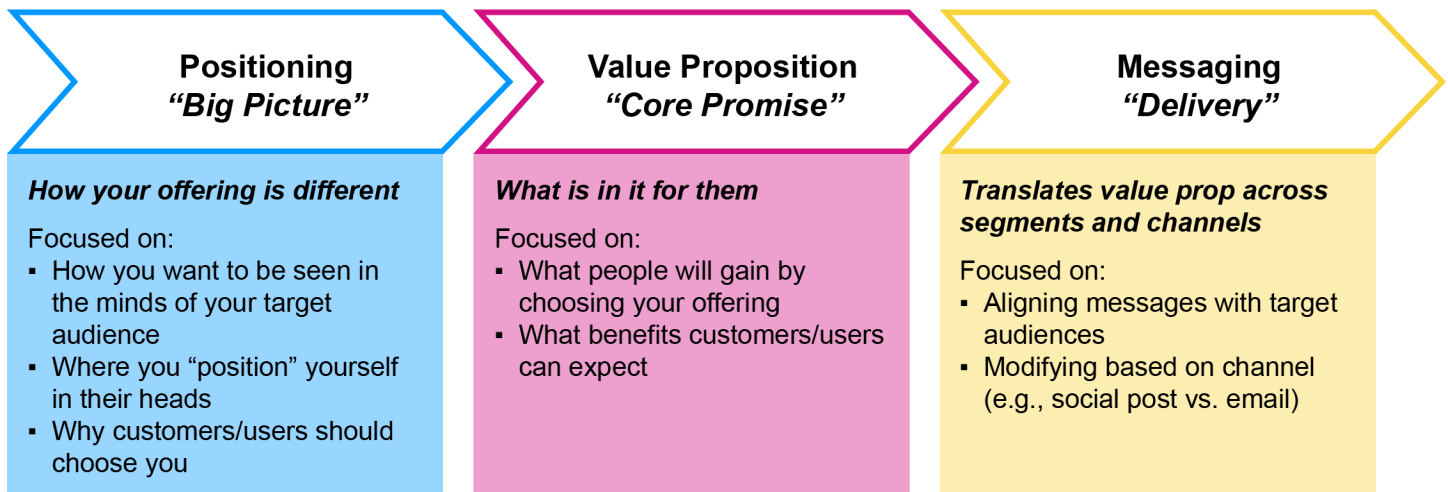
What Your Product Is	What It Does (for Target Audiences)	Why It Matters
<ul style="list-style-type: none"> <li>▪ What is included?</li> <li>▪ Is it technology-based?</li> <li>▪ Are there professional services or training?</li> <li>▪ Is there a content or curriculum component?</li> <li>▪ What are the specific features?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Who is it for?</li> <li>▪ How do they use it?</li> <li>▪ What does it help them do?</li> <li>▪ How is it accessed?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Why should your target audience care (e.g., perceived value)?</li> <li>▪ How and why is your product different and better from the alternatives already available?</li> </ul>

**Note:** Adapted from “The Importance of Value-Based Positioning, by G. Hunter, n.d., *Product Growth Readers*.



# From Value-Based Positioning to Messaging

Value-based positioning is essential to your messaging strategy. The graphic below illustrates the relationships between positioning, the value proposition, and messaging.



**Value-based positioning** is about what sets you apart. It is about how you show your unique value so that customers feel, "This product is the one for me because it aligns with my values or needs." It informs the messaging you share externally (written, video, audio, verbal), but it is typically not what you put front and center.

The **value proposition** articulates what your target audience gains if they choose your product. It is not just about why you are different from the competition, but also about what you promise to deliver. The value proposition is usually a short statement expressing the benefits that customers can expect.

**Messaging** is how you bring your value-based positioning and value proposition to life in all your communications—your advertising, social media, website, customer interactions, and beyond. You translate your value proposition into messages that connect with different customer groups, convey your product's benefits, and reflect the personality of your brand.

For each brand or product, these three elements work together, making it easy for customers to recognize the brand's purpose and feel confident in choosing the product for the value it promises. To summarize:

- **Positioning** establishes your unique place in the market.
- The **value proposition** clarifies the direct benefit to the customer.
- **Messaging** brings this promise to life across different touchpoints, appealing to the customers' emotions, convenience, and practical needs.

The steps below include exercises to help you develop your value-based positioning.



## Step 1: Prepare a Target Audience Value Map

The first step helps you begin to think about your product in an audience-centric way.

### Example Target Audience Value Map

The table below provides a framework for identifying the strategic priorities and goals of target audiences and the challenges that stand in their way to achieving those goals. The example in the table illustrates how to complete this framework for three audiences, from decision-maker to end user.

Role	Strategic Priorities	Challenges
<i>ICA</i>	<i>What are their main objectives?</i>	<i>What stands in their way of achieving the objectives?</i>
<b>Decision-Maker PRINCIPAL</b>	<ul style="list-style-type: none"> <li>Foster a schoolwide literacy culture</li> <li>Provide resources and training for teachers</li> <li>Monitor literacy progress and outcomes</li> </ul>	<ul style="list-style-type: none"> <li>Resource constraints</li> <li>Balancing multiple priorities</li> <li>Data collection and analysis</li> </ul>
<b>End User 1 TEACHERS</b>	<ul style="list-style-type: none"> <li>Deliver engaging, inclusive literacy Instruction</li> <li>Differentiate instruction for varying literacy levels</li> <li>Build relationships to foster student motivation</li> </ul>	<ul style="list-style-type: none"> <li>Limited time for lesson planning and differentiation</li> <li>Lack of access to varied, culturally relevant materials</li> <li>Managing classroom dynamics and behavior</li> </ul>
<b>End User 2 STUDENT</b>	<ul style="list-style-type: none"> <li>Develop foundational reading and writing skills</li> <li>Foster a love for reading and writing</li> <li>Access literacy support when needed</li> </ul>	<ul style="list-style-type: none"> <li>Motivation and confidence issues</li> <li>Limited exposure to diverse materials</li> <li>Varying levels of literacy preparedness</li> </ul>



## Worksheet: Target Audience Value Map

Complete the table based on your ICA.

Role	Strategic Priorities	Challenges
<i>ICA</i>	<i>What are their main objectives?</i>	<i>What stands in their way of achieving the objectives?</i>
<b>Decision-Maker</b>		
<b>End User 1</b>		
----- <b>(Other)</b>		



## AI Insights for ICP Priorities and Challenges

*AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help you understand the challenges and interests of your ICA for target audience value-mapping. Customize and paste them into ChatGPT (or another AI tool).*

**AI prompt:** What are the strategic priorities of **[insert your ICA]**? What challenges or struggles do **[insert your ICA]** face when **[insert what your offering helps people do]**?

**Example:** What are the strategic priorities of **middle school principals**? What challenges/struggles do **middle school principals** face **when trying to improve students reading skills**?

**AI prompt:** Help me fill out a table that maps priorities and challenges associated with those priorities for 3 target audiences. 1. **[insert your decision-maker ICA]**, 2. **[insert your implementer ICA]**, and 3. **[insert your end user ICA]**.

**Example:** Help me fill out a table that maps priorities and challenges associated with those priorities for 3 target audiences. 1. **middle school principal**, 2. **teacher**, and 3. **student**.





## Step 2: Define Your Portfolio Packaging and Capabilities

Another important exercise is to have a clear understanding of the packages and capabilities for your product. Packaging refers to how someone can purchase and implement components of your product.

The table below can help you organize the packaging and capabilities for your product. Use the worksheet following the table to record your ideas.

### Key Considerations for Portfolio Packaging and Capabilities by Type

Type	Name and Purpose	What is Included
<b>Service</b>	What is the name of your service and how is it used (e.g., math tutoring services accessible to students during class time)?	What capabilities or features are included in the service (e.g., virtual tutoring)?
<b>Content or Curriculum</b>	What is the name of your content and how is it used (e.g., math supplemental resources accessible to students during class time)?	What capabilities or features are included in the content (e.g., ready-to-use lessons for K–5 students)?
<b>Product / Technology</b>	What is the name of your product or technology and how is it used (e.g., math intervention app accessible to students during class time)?	What capabilities or features are included in the product or technology (e.g., virtual manipulatives that correspond with the lessons and tutoring for K–5 students)?
<b>Partnerships</b>	Do you have any partnerships that your customers benefit from (e.g., access to other math intervention tools and content)?	What are the terms of the partnership? How do they access partner resources?
<b>Community</b>	Is there a customer community that provides added value to customers (e.g., monthly meetups for teachers using the product)?	What community engagement features are available?



## Worksheet: Portfolio Packaging and Capabilities

Complete the worksheet below based on the considerations above. You may have more than one service, content, or product type, so add more rows as needed for your unique offering.

Type	Name and Purpose	What is Included
Service 1		
Service 2		
Content or Curriculum 1		
Content or Curriculum 2		
Product / Technology 1		
Product / Technology 2		
Partnerships		
Community		



## Step 3: Map Your Capabilities to Target Audience Values

Based on your responses in Step 2 and using the table below, map your capabilities that will help your target audiences overcome the challenges that stand in their way of achieving their strategic priorities. Depending on the breadth and depth of your product, you may want to expand this into a larger table or create a separate table for each ICA (see Option 2).

### Worksheet: Map Your Capabilities to Target Audience Values

Role	Strategic Priorities	Challenges	Your Capabilities
<i>ICA</i>	<i>What are their main objectives?</i>	<i>What stands in their way of achieving the objectives?</i>	<i>What features and capabilities help them overcome these challenges?</i>
<b>Decision-Maker</b>			
<b>Implementer</b>			
<b>(Other)</b>			



## Worksheet (Option 2): Value Map of Target Audience Need and Capabilities

Based on your responses in Step 2 and using the tables below, map your capabilities that will help your target audiences overcome the challenges that stand in their way of achieving their strategic priorities.

<b>DECISION-MAKER</b>	
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<b>Strategic Priorities</b>	<b>Challenges</b>	<b>Your Capabilities</b>
<i>What are their main objectives?</i>	<i>What stands in their way of achieving the objectives?</i>	<i>What features and capabilities help them overcome these challenges?</i>



END-USER

Strategic Priorities	Challenges	Your Capabilities
<i>What are their main objectives?</i>	<i>What stands in their way of achieving the objectives?</i>	<i>What features and capabilities help them overcome these challenges?</i>

## Step 4: Craft a Value-Based Positioning Statement

Now you have the key inputs to develop a value-based positioning statement. Remember that value-based positioning is about explaining the value your product creates for the audiences who use it. It shifts the focus from features (what the product does) to outcomes and benefits (how it helps). The framework below present an approach and a set of questions to help you craft a statement. This ensures your messaging resonates with your audiences by answering:

- What problem does your product solve?
- How does it improve their situation?
- Why is it better than other options?

### Framework for Value-Based Positioning

Step	Approach	Questions to Ask
<b>Identify Your Audience's Pain Points</b>	Think about who your product is for and what challenges they face. These challenges (also called “pain points”) are the problems your audience needs help with.	<ul style="list-style-type: none"> <li>▪ What makes their job difficult?</li> <li>▪ What tasks or processes take too much time?</li> <li>▪ What causes them frustration or stress?</li> </ul>
<b>Highlight the Key Benefit or Outcome</b>	Focus on how your product helps solve the pain points you identified. The benefit or outcome is the positive change your audience will experience by using your product.	<ul style="list-style-type: none"> <li>▪ Pain point: What frustrates them?</li> <li>▪ Benefit: How does your product make things easier or better?</li> </ul>
<b>Add a Distinction (What Makes You Different?)</b>	Think about what makes your product unique or better than other options. This could be a feature, process, or outcome that competitors do not offer. This could also be you and your team.	<ul style="list-style-type: none"> <li>▪ Does your product do something faster, easier, or more effectively?</li> <li>▪ Do you offer a feature that saves time or resources?</li> <li>▪ Do you provide better support, training, or integration with other tools?</li> <li>▪ Do you and your team have unique experience and expertise?</li> </ul>
<b>Write Your Value-Based Positioning Statement</b>	Now that you have the pieces (pain points, benefits, and distinction), put them together into a concise, clear statement.	<ul style="list-style-type: none"> <li>▪ Who do you help (your audience)?</li> <li>▪ What problem do you solve (pain point)?</li> <li>▪ How does your product help (key benefit/ outcome)?</li> <li>▪ Why is it better (distinction)?</li> </ul>



# Template: Value-Based Positioning Statement

Use this template to craft a value-based positioning statement. If you have different products or target audiences, try crafting a unique value-based positioning statement for each one.

## Value-Based Positioning Statement Example

<b>Target Market and Audience</b>	U.S. K–12 Districts and Schools Middle School Teachers
<b>Positioning Statement Template</b>	Our <b>[your product or service]</b> helps <b>[your ICA]</b> <b>[address a specific problem or use case]</b> by <b>[key benefit/outcome]</b> , so they can <b>[accomplish what offering uniquely addresses]</b> .
<b>Positioning Statement Example</b>	Our <b>reading intervention platform</b> helps <b>middle school teachers support struggling students</b> by <b>automatically adjusting lessons based on student performance</b> , so they can <b>offer tailored instruction without the added workload</b> .

## Value-Based Positioning Statement Template

<b>Target Market and Audience</b>	
<b>Positioning Statement Template</b>	



## AI Insights for Value-Based Positioning

*AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help craft value-based positioning statements. Customize and paste them into ChatGPT (or another AI tool) to develop and refine your statements.*

**AI prompt:** Help develop value-based positioning for my **[product type]** that helps **[your ICA]** in **[your ICP]** overcome **[challenge/pain point]**. **[Product type]** helps **[ICA key benefit/outcome]**.

**Example:** Help develop value-based positioning for my **reading intervention app** that helps **reading teachers** in **elementary school** overcome **the inability to meet the needs of all students**.

**My reading intervention app** helps **reading teachers** provide **adaptive reading intervention support** without **disrupting class time**.

*Pro tip: Ask for 3–5 more examples with specific shifts based on your preferences. For example, try the prompt “Give me 3 more examples, 1 geared toward a school leader, 1 that’s more playful, and 1 that creates a sense of urgency.”*



## From Positioning Statements to Pillars

Once you craft positioning statements for all of your target audiences (e.g., ICAs), they can become pillars that help you organize how you communicate internally and with the market. The example in the table below illustrates how to organize positioning by audience groups for a reading intervention program. Each pillar is aligned to a target audience (e.g., an end user or decision-maker) and the corresponding positioning statement, with placeholders for supporting capabilities and features (as identified in Step 3) that serve as proof points for that pillar. In some cases, the same feature or capability may be relevant across multiple pillars.

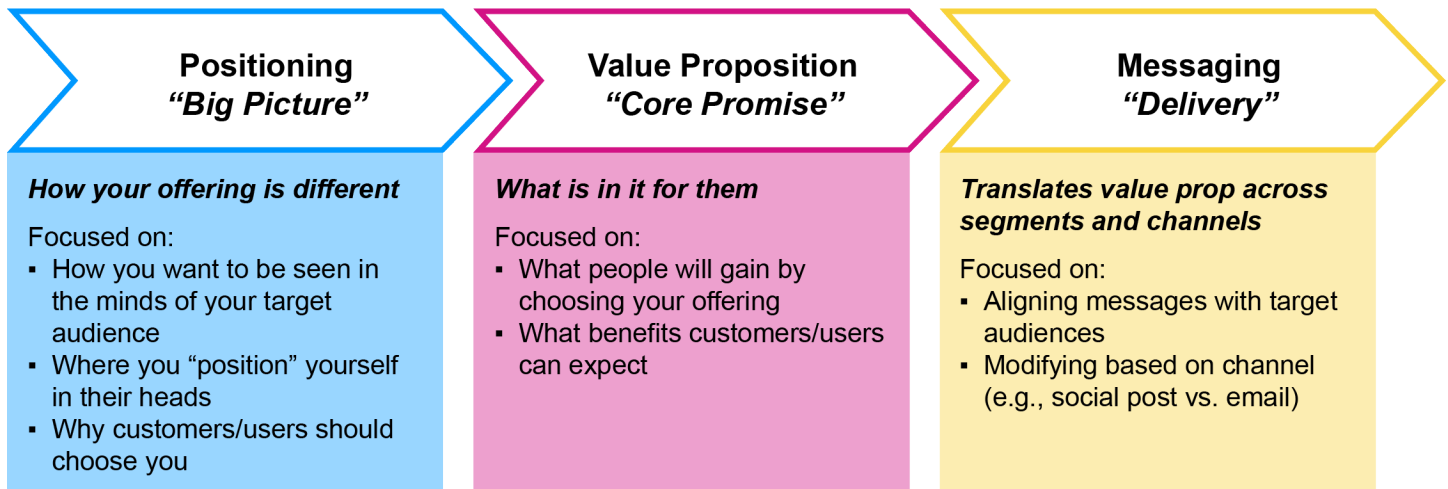
	End User 1	End User 2	Decision-Maker
Positioning Statement	For middle school students who struggle with reading and feel frustrated in class, <b>[Reading Intervention Program]</b> helps you become a confident and capable reader because it uses engaging, step-by-step lessons designed to build your skills and self-belief.	For middle school teachers who want to better support struggling readers, <b>[Reading Intervention Program]</b> provides targeted, easy-to-implement interventions because it integrates proven instructional techniques and real-time progress tracking tools.	For middle school administrators who need to improve literacy outcomes across all student populations, <b>[Reading Intervention Program]</b> delivers measurable reading growth at scale because it combines evidence-based strategies with data-driven insights to ensure no student is left behind.
Proof Points	<ul style="list-style-type: none"> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> </ul>	<ul style="list-style-type: none"> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> </ul>	<ul style="list-style-type: none"> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> <li>▪ feature or capability</li> </ul>

Value-based positioning helps you communicate your product’s real-world impact by focusing on the outcomes that matter most to your target audiences. Instead of leading with features, it shows how your offering solves key problems, saves time, and delivers meaningful results. This approach ensures your create messaging that resonates with customers, builds trust, and motivates action—setting your product apart in a crowded market.



## Craft Your Messaging

Value-based positioning is an essential input to your messaging strategy. The graphic below illustrates the relationships between positioning, the value proposition, and messaging.



As a reminder, **value-based positioning** is about what sets you apart. It is about how to show your unique value so that customers feel, “This product is the one for me because it aligns with my values or needs.” It informs the messaging you share externally (written, video, audio, verbal), but it is typically not what you put front and center.

The **value proposition** is all about what your target audience gains if they choose your product. It is not just about why you are different from the competition, but also about what you promise to deliver. The value proposition is usually a short statement expressing the benefits that customers can expect.

**Messaging** is how you bring your value-based positioning and value proposition to life in all your communications—your advertising, social media, website, customer interactions, and beyond. You translate your value proposition into messages that connect with different customer groups, convey your product’s benefits, and reflect the personality of your brand.

Now that you have developed value-based positioning statements for your target audiences (e.g., ICAs), you are ready to craft value propositions and messaging.

# From Positioning to Messaging

The table below builds on the example organization of pillars in the previous section. To each pillar, it adds a value proposition and core problem, which are then reflected in the messaging beneath them.

## Example Pillars with Value Propositions, Core Problems, and Messaging

	End User 1	End User 2	Decision-Maker
<b>Positioning Statement</b>	For middle school students who struggle with reading and feel frustrated in class, <b>[Reading Intervention Program]</b> helps you become a confident and capable reader because it uses engaging, step-by-step lessons designed to build your skills and self-belief.	For middle school teachers who want to better support struggling readers, <b>[Reading Intervention Program]</b> provides targeted, easy-to-implement interventions because it integrates proven instructional techniques and real-time progress tracking tools.	For middle school administrators who need to improve literacy outcomes across all student populations, <b>[Reading Intervention Program]</b> delivers measurable reading growth at scale because it combines evidence-based strategies with data-driven insights to ensure no student is left behind.
<b>Value Proposition</b>	Build confidence and skills through engaging, student-centered lessons that make reading achievable and rewarding.	Save time with a structured program that delivers actionable insights and supports diverse learning needs.	Improve schoolwide literacy outcomes through a scalable, research-backed solution with clear, actionable data.
<b>Core Problem</b>	Middle school students reading below grade level struggle across all subject areas.	Middle school teachers have limited capacity to provide targeted reading interventions tailored to individual learners.	Middle school administrators are held accountable for student learning outcomes and have limited resources for intervention.
<b>Messaging</b>	Struggling with reading doesn't mean students can't succeed. Our step-by-step program helps students become the reader they've always wanted to be—confident, capable, and ready for anything.	Teaching struggling readers is a challenge, but it doesn't have to be overwhelming. Let <b>[Reading Intervention Program]</b> provide the structure and support you need to make a lasting impact.	Every student deserves the chance to succeed. When literacy outcomes improve, everyone wins. With <b>[Reading Intervention Program]</b> you can ensure measurable literacy improvement across your school.
<b>Proof Points</b>	<ul style="list-style-type: none"> <li>feature or capability</li> <li>feature or capability</li> </ul>	<ul style="list-style-type: none"> <li>feature or capability</li> <li>feature or capability</li> </ul>	<ul style="list-style-type: none"> <li>feature or capability</li> <li>feature or capability</li> </ul>



## Exercise: From Positioning to Messaging

Use the template below to develop your value proposition and initial messaging statements for each audience pillar.

	End User 1	End User 2	Decision-Maker
Positioning Statement			
Value Proposition			
Core Problem			
Messaging			
Proof Points			



Messaging length, tone, and style will vary depending on which communication or marketing channel you use. For example, a message at the top of your website home page will look different from a message you post on social media. Partnering with AI to develop variations of messaging for different channels can be an excellent way to expand your brainstorming, copywriting, and wordsmithing capacities.

### AI Insights for Bridging Positioning and Messaging

*AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help craft value-based positioning statements. Customize and paste them into ChatGPT (or another AI tool) to develop and refine your positioning statements.*

**AI prompt:** You are a product marketer with strong copywriting skills. Help develop value-based positioning statements, value propositions, and corresponding messaging that promotes **[product name]** for three different audiences: **[End User 1, End User 2, Decision-Maker 1]**.

- [Product name]** helps **[End User 1] [key benefit/outcome]**.
- [Product name]** helps **[End User 2] [key benefit/outcome]**.
- [Product name]** helps **[Decision-Maker 1] [key benefit/outcome]**.

**Example:** You are a product marketer with strong copywriting skills. Help develop value-based positioning statements, value propositions, and corresponding messaging promoting **my reading intervention app** for three different audiences: **middle school student, middle school teacher, middle school principal**.

- My reading intervention app** helps **middle school students become confident readers**.
- My reading intervention app** helps **middle school teachers better support struggling readers**.
- My reading intervention app** helps **middle school principals improve learning outcomes across all subject areas**.

**Follow-up:** Create messaging tailored for the following channels: website home page, LinkedIn, Instagram, email subject and headline, and paid ad with 200-character count limit.



## Define a Multichannel Marketing Strategy

A key part of any GTM strategy is activation—getting your plan in motion to reach your ideal customers and drive engagement. A multichannel marketing strategy is essential because your target audiences are not all in one place. This approach uses various methods and messaging across communication and marketing channels to connect with your audience through different forums and platforms.

### Why Is Multichannel Marketing Important?

People consume information in different ways. Some prefer email newsletters while others prefer webinars, conferences, or doing their own research. Others may use social media as a research tool. By having your audience-centric messaging show up in multiple places, you increase the chances of reaching the right people at the right time.

## Multichannel Marketing Blueprint

- 1. Review GTM channels:** Identify what GTM channels you have available, how they are being used, and where you may need to invest.
- 2. Have a quarterly focus by audience:** Prioritize your GTM efforts in quarterly blocks, using an audience-first approach. Thinking about where your target audience goes for information at which times during the year can help you prioritize your marketing efforts.
- 3. Unify campaigns with quarterly themes and focus:** Try to identify at least one event to focus on each quarter (e.g., industry event or paid webinar) where you will be able to reach many people in your target audience. The themes of these events can inform focused marketing campaigns that help unify your efforts across channels.
- 4. Define marketing campaigns:** Define campaigns with clear goals to help drive focus and inform prioritization of which channels to activate when.
- 5. Align channel strategy and tactics with campaigns:** Once you identify your campaign goals, timelines, and themes, you will need to choose the marketing channels most likely to yield your desired results.

## Step 1: Review GTM Channels

Which GTM channels do you already have? Which ones are most effective in reaching and engaging your target audiences? Where might you need to invest to reach your audiences across new channels?

The table below will help you identify available GTM channels to support activation. You can use this table as a checklist to review what channels are currently active, where you may want to invest, and what channels may not be relevant to reach your target audiences.



## Exercise: GTM Channel Review

Complete the table below to inventory your existing GTM channels and identify new channels you may want to invest in.

Go-To-Market Channels		Active	Desired	Not Relevant	Notes
<b>OWNED Media</b>	Website				
	Emails				
	Core content (sales deck, proposals)				
	Case studies and testimonials				
	Thought leadership				
	Webinars (self-hosted)				
	Social media (LinkedIn, Instagram)				
<b>EARNED Media</b>	Influencer engagement and PR				
<b>PAID Media</b>	Google Ads				
	Publication ads (e.g., Education Week)				
<b>Community</b>	In-person/online events, online forums				
<b>Sales / BD</b>	Direct sales, account management, resellers, partnerships				



## Step 2: Have a Quarterly Focus by Audience

Focus is key when building and executing against a multichannel marketing plan. It is helpful to prioritize quarterly focus areas based on a theme that is relevant to your target audiences (your ICAs) at certain times during the year. For example, there may be an industry event in the fall for decision-makers and an event in the summer for end users. By blending an audience-centric approach with seasonality, you will be able to prioritize where to invest your time and resources each quarter. The table below can help you prioritize where to focus for each quarter.

### Example for Quarterly Focus by Audience (Education)

Audience	Quarter	Role	Theme	Industry Event Name	Industry Event Date
<b>Decision-Maker 1</b>	Q1	Superintendent	Student performance and intervention Teacher development and support		
<b>Decision-Maker 2</b>	Q2	Assistant Superintendent	Summer school and learning loss mitigation End-of-year testing and assessments		
<b>Influencer</b>	Q3	Principal	Back-to-school preparation Onboarding new staff		
<b>End User</b>	Q4	Teachers	Addressing learning gaps and review Celebrating student achievements and reflection		





## Template: Quarterly Focus by Audience

Complete the third and fourth columns in the template below to begin identifying quarterly focus areas by audience.

Audience	Quarter	Role	Theme	Industry Event Name	Industry Event Date
Decision-Maker 1	Q1				
Decision-Maker 2	Q2				
Influencer	Q3				
End User	Q4				

### AI Insights for Quarterly Focus

AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help identify quarterly focus areas by audience. Customize and paste them into ChatGPT (or another AI tool) to partner with AI in developing and refining quarterly focus areas.

**AI prompt:** You are a **[insert target market]** market expert. Map out the seasonality of strategic priorities of decision-makers and influencers each quarter. Q1 is **[months represent Q1]**. The decision-makers and influencers are **[Decision-Maker 1, Influencer 1, Influencer 2]**. Organize it in a table format.

**Example:** You are a **U.S. K–12 education** market expert. Map out the seasonality of strategic priorities of decision-makers and influencers each quarter. Q1 is **January to March**. The decision-makers and influencers are **superintendents, assistant superintendents, and principals**. Organize it in a table format.

## Step 3: Unify Campaigns with Quarterly Events

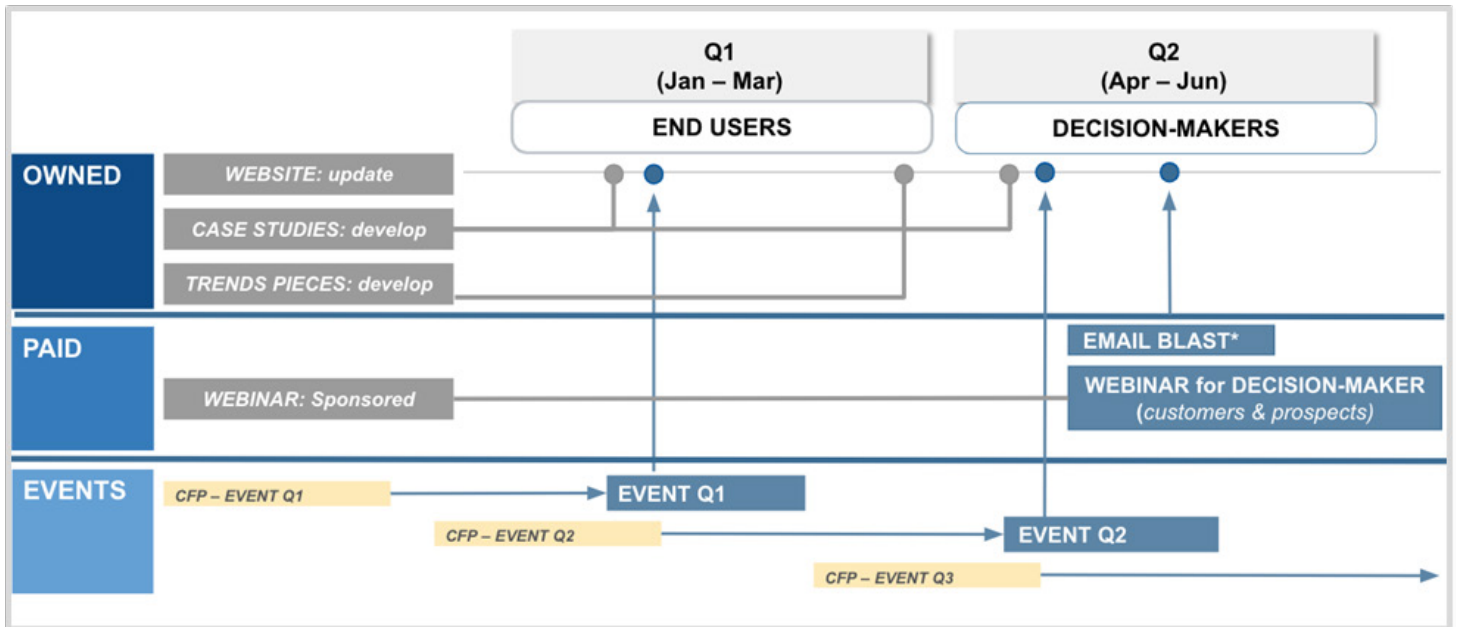
Try to identify at least one event each quarter (e.g., industry event, webinar, community gathering) where you will be able to reach many people in your target audience. These events can serve as powerful anchors for marketing campaigns that help unify your efforts across channels. Expanding on the example from the previous section, the table below illustrates how an organization serving education markets leverages industry events to reach specific target audiences each quarter.

### Example of Quarterly Focus by Audience, Aligned to Events (Education)

Audience	Quarter	Role	Theme	Industry Event Name	Industry Event Date
<b>Decision-Maker 1</b>	Q1	Superintendent	Student performance and intervention Teacher development and support	AASA – The School Superintendents Association Conference	March
<b>Decision-Maker 2</b>	Q2	Assistant Superintendent	Summer school and learning loss mitigation End-of-year testing and assessments	ASCD (Association for Supervision and Curriculum Development) Conference	June
<b>Influencer</b>	Q3	Principal	Back-to-school preparation Onboarding new staff	National Association of Secondary School Principals (NASSP) Conference	July
<b>End User</b>	Q4	Teachers	Addressing learning gaps and review Celebrating student achievements and reflection	Innovative Schools Summit	November

## Example for Quarterly Focus by Audience, Aligned to Events

The graphic below illustrates the connections between quarterly focus by audience and aligned events. A description of these events and connections is provided following the graphic.



**Note.** CFP = Call for proposals to present at an event.

Description of the graphic:

- In Q1, the developers will focus on targeting end users (e.g., teachers implementing new software or an intervention) and reach those end users at an industry event. They will also create relevant case studies that align with the needs of their target audiences that quarter. Ideally, they will distribute case studies that highlight the value for a specific target audience at the event focused on that audience. The developers' website will be the primary channel to share updates about their event participation and promote any new content pieces.
- In Q2, the developers will focus on one of their target decision-makers (e.g., an academic dean or a school principal). Because decision-makers are harder to reach, the developers will invest in two events—one in-person event and one paid webinar through a trusted media outlet in the education market.
- The developers will secure speaking spots at two industry events. This is a great way to build brand awareness, especially when including customer voices advocating for a product. Securing these selective spots often requires responding to a call for proposals (CFP), which generally happens several months before an event.
- Q3 and Q4 (not shown in the graphic) follow a similar pattern.



## Template: Quarterly Focus by Audience, Aligned to Events

Using your information from the template in the previous section, complete the template below to align your quarterly focus areas by audience with events.

Audience	Quarter	Role	Theme	Industry Event Name	Industry Event Date
Decision-Maker 1	Q1				
Decision-Maker 2	Q2				
Influencer	Q3				
End User	Q4				

## Step 4: Define Marketing Campaigns

By this point, you should have a good sense of what marketing channels you have access to, what themes will resonate with your target audiences each quarter, and what events you could leverage to reinforce those themes with your target audiences (e.g., industry event or webinar). Now, you are ready to put all the pieces together to define and plan your marketing campaigns.

Marketing campaigns are specific, time-bound efforts designed to achieve a particular objective, such as increasing brand awareness, launching a product, driving adoption and usage, or boosting sales. They often focus on a single theme or message and may use a variety of marketing channels. Marketing campaigns are often time-intensive and typically require 2–3 months of preparation and dedicated time during the duration of the campaign.

### Marketing Campaign Planning Milestones

Creating a marketing campaign requires a blend of creative vision and precise, detail-oriented execution. While it may seem challenging to bring all the moving parts together, breaking the process into clear, actionable steps helps ensure your vision translates into effective strategies that drive your business goals with impactful creativity and efficient delivery. The campaign planning steps in the graphic below illustrate the pathway from goal-setting to execution and measurement.





## Worksheet: Marketing Campaign Planning Tool

You can use the worksheet below as an internal planning tool to help ensure your marketing campaign is well-organized, targeted, and measurable.

Audience	Description	Notes
<b>Set Clear Campaign Goals</b>	<ul style="list-style-type: none"><li>▪ Identify your goals (e.g., increase brand awareness, increase sales).</li><li>▪ Make your goals SMART (specific, measurable, achievable, relevant, and time-bound).</li></ul>	
<b>Identify Your Target Audience</b>	<ul style="list-style-type: none"><li>▪ Define who you are trying to reach based on your ideal customer profile (ICP) and ideal customer avatar (ICA).</li><li>▪ Research where the audience goes for information and which events they attend.</li></ul>	
<b>Develop the Campaign Theme and Message</b>	<ul style="list-style-type: none"><li>▪ Leverage your value-based positioning to craft a compelling message that resonates with your audience and aligns with your campaign goals.</li><li>▪ Choose a central theme to unify all elements of the campaign.</li><li>▪ If your campaign ties to an industry event, align your message with the event theme for maximum relevance.</li></ul>	



Audience	Description	Notes
<b>Choose the Right Marketing Channels</b>	<ul style="list-style-type: none"><li>▪ Select channels where your audience is most active (e.g., events, social media, community forums).</li><li>▪ Use a multichannel approach for maximum reach and engagement.</li></ul>	
<b>Plan the Campaign Timeline</b>	<ul style="list-style-type: none"><li>▪ Set clear start and end dates.</li><li>▪ Create a content calendar to schedule actions (emails, social posts, ads) throughout the campaign to ensure consistent engagement and visibility.</li></ul>	
<b>Allocate Budget and Resources</b>	<ul style="list-style-type: none"><li>▪ Determine how much to spend on each campaign component (content creation, social posts, events, etc.).</li><li>▪ Create an integrated campaign plan to support cross-functional project management across all activities and channels, ensuring effective resource allocation.</li></ul>	
<b>Launch, Monitor and Optimize</b>	<ul style="list-style-type: none"><li>▪ Track the campaign's performance using key metrics (e.g., website traffic, email open and click-through rates, event leads, lead conversions, return on investment).</li><li>▪ Regularly monitor and adjust based on performance data to optimize results in real time.</li></ul>	



## Step 5: Align Channel Strategies and Tactics with Campaigns

Once you define your marketing campaigns, you can identify which tactics to use across the channels you select for those campaigns.

In marketing, tactics are practical, actionable elements that make a campaign plan operational and measurable. Tactics specify the tools, channels, messaging, and timing used to reach target audiences and meet campaign goals. For example, if the strategy is to increase brand awareness, tactics could include:

- A monthly blog series that is promoted by monthly emails
- Regular updates on social media that align with the quarterly and/or campaign theme
- Targeted ads across multiple channels (Google Ads, LinkedIn Ads, media outlet)

### Example Channel Strategy and Tactic Alignment

The example below illustrates a channel strategy and corresponding tactics based on a campaign strategy that has a quarterly focus by audience, aligned to events. The “PAID Events” section indicates the developers will attend an industry event each quarter and sponsor a paid webinar in Q2 and Q4. The tactics they will deploy across channels all align with the quarterly focus areas.





Go-To-Market Channels		Q1	Q2	Q3	Q4
<i>Audiences:</i>		<i>Influencer</i>	<i>Decision-Maker</i>	<i>Influencer</i>	<i>Decision-Maker</i>
<b>Events</b>	Industry Events	Event 1	Event 2	Event 3	Event 4
	Webinars		Paid webinar 1		Paid webinar 2
<b>OWNED Media</b>	Website	Promote event	Launch case studies Promote event and webinar	Promote event	Launch case studies Promote event and webinar
	Emails	Email campaign event 1	Email campaign event 2	Email campaign event 3	Email campaign event 4
	Core content (sales deck, proposals)		Update with case studies		Update with case studies
	Case studies and testimonials	Develop for Q2 audience		Develop for Q4 audience	
	Thought leadership				
	Webinars (self-hosted)				
	Social media (LinkedIn, Instagram)	Promote event	Promote case studies, event, and webinar	Promote event	Promote case studies, event, and webinar
	<b>EARNED Media</b>	Influencer engagement and PR			
<b>PAID Media</b>	Google Ads				
	Publication ads (e.g., Education Week)				
<b>Community</b>	In-person/online events, online forums				
<b>Sales / BD</b>	Direct sales, account management, resellers, partnerships	Business development meetings at events, targeted outreach, opportunity management			



## Worksheet: Channel Strategy and Tactic Alignment

Building on the earlier activities, use the template below to prioritize which channels you will want to activate each quarter based on your target audiences, quarterly themes, and focus areas, and which tactics you will deploy across each channel.

### Channel Strategy and Tactic Alignment (Events and Owned Media)

Go-To-Market Channels		Q1	Q2	Q3	Q4
<i>Audiences:</i>		<i>Influencer</i>	<i>Decision-Maker</i>	<i>Influencer</i>	<i>Decision-Maker</i>
<b>Events</b>	Industry Events				
	Webinars				
<b>OWNED Media</b>	Website				
	Emails				
	Core content (sales deck, proposals)				
	Case studies and testimonials				
	Thought leadership				
	Webinars (self-hosted)				
	Social media (LinkedIn, Instagram)				
<b>EARNED Media</b>	Influencer engagement and PR				
<b>PAID Media</b>	Google Ads				
	Publication ads (e.g., Education Week)				
<b>Community</b>	In-person/online events, online forums				
<b>Sales / BD</b>	Direct sales, account management, resellers, partnerships				



## AI Insights for Multichannel Marketing Ideas

*AI tools like ChatGPT (or another AI tool of your choice) can be helpful collaboration resources for validating research and providing additional considerations. Try out the sample prompts below to help generate ideas for how to amplify your brand awareness efforts across multiple marketing channels. Customize and paste them into ChatGPT (or another AI tool).*

**AI prompt:** You are a marketing campaigns manager. Build a multi-quarter marketing plan from **[start date to end date]**. Each quarter has one industry event focused on a key decision-maker. Decision-makers we are targeting include **[list decision-makers]**. Help me generate a multichannel marketing plan that leverages the quarterly events and streamlines efforts across all channels.

**Example:** You are a marketing campaigns manager. Build a multi-quarter marketing plan from **January 1, 2025, to December 31, 2025**. Each quarter has one industry event focused on a key decision-maker. Decision-makers we are targeting include **K-12 superintendents and middle school principals**. Help me generate a multichannel marketing plan that leverages the quarterly events and streamlines efforts across all channels.



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