

This checklist guides you through identifying, verifying, and implementing a differentiation strategy for your business.

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Step 1: Research

Uncover Your Authentic Differentiators

Your first steps involve seeing yourself through your clients' eyes.

- Hire an outside provider to conduct qualitative market research on your behalf. To avoid inherent bias, you should not conduct this research yourself. Consider trading services with another trusted firm or researcher.
- Interview your best current clients. Use the following questions as a guide to uncover pain points, trust signals, and the value your clients receive from you.
 - What challenges were you initially trying to solve when you first hired us?
 - What other solutions or firms did you consider?
 - What made you first decide to hire our firm?
 - What made you think you could trust us to solve your challenges?
 - Why do you continue to work with our firm?
 - What do you value most in our processes?
 - What do you like least about market research in general?
 - What value do you receive from working with us?
 - When you tell others about working with us, what do you say?
 - How did you use the insights we provided?
 - What difference, if any, did the insights we provided make for you?
- Compile a list of potential differentiators based on the insights gathered from your client interviews.
- Create a list of your competitors based on the other firms your clients also considered hiring.

Step 1: Research

Understand the Competitive Landscape

Once you have a list of potential differentiators, place them in the context of your competitors to find gaps in the market that you can leverage. Using a spreadsheet might help you organize your findings.

- Conduct a competitive analysis. Choose three to five competitors you have lost business to and analyze their websites and social media for the following:
 - Core Brand Promises
 - Target Audiences
 - Value Propositions
 - Stated Differentiators
 - SEO Keywords their Websites Are Optimized For
 - General Reputation
 - Proof Points
 - Calls to Action
- If your time is limited, use the "quick and dirty" method by focusing your analysis solely on your competitors' core brand promises, target clients, value propositions, and differentiators.
- Identify market gaps. Based on your analysis, determine where there are opportunities for your firm to stand out with a unique message or position.

Step 2: Select & Sharpen

Choose & Sharpen Your Differentiators

With your internal and external research completed, you can now make informed decisions on the differentiators on which to focus.

- Review your list of potential differentiators against your competitive analysis. Cross-reference what your clients value about you with what competitors say--and don't say--about themselves.
- Select differentiators that are authentic, relevant, and provable. Your claims must be true, matter to your target audience, and be something you can substantiate.

Step 3: Validate

Test Your Differentiator in the Real World

Before you fully commit to a differentiator, make sure it will work inside and outside your business.

- Share the positioning with a handful of ideal clients or prospects. Ask: Does this feel valuable? Distinct? Believable? Would it affect their choice of partner?
- Check competitive reality. Confirm that major competitors are not making the same claim—or, if they are, that you can credibly prove you do it in a substantially better or different way.
- Plan how you'll prove it. For harder-to-prove promises, define the evidence you'll build:
 - Stronger case studies
 - Clear metrics and before/after results
 - Awards or third-party validation
 - Original research or benchmarks
 The output of this step is a validated differentiator plus a concrete evidence plan you can execute over the next 6–12 months.

Step 4: Live It

Bring Your Differentiation to Life

A differentiation strategy is only effective if it is fully operationalized and communicated consistently and powerfully. If you don't live your differentiators, they don't exist.

- Update all brand messaging to reflect your new positioning. This includes your website, social media profiles, advertising, sales materials, and any other client-facing communication.
- Develop content that highlights your differentiators. Create case studies or other materials that provide proof of your unique value and expertise.
- Train your team. Ensure everyone in your organization, especially the sales team, understands and can articulate the chosen differentiators.
- Embed it in strategy, operations, and policies. Make sure your focus shows up in:
 - Service design and processes
 - Hiring and training
 - Internal priorities and what you say "no" to
- Build proof over time. Systematically collect and create:
 - Case studies tied directly to your differentiator
 - Metrics and outcome data
 - Testimonials from ideal clients
 - Proprietary tools, frameworks, or reports

Step 5: Monitor & Iterate

Differentiation Is Not One and Done

Over time, competitors may copy your language or move into your niche. Keep an eye on their messaging and offers.

- Reinforce and invest. Keep building visibility and proof through:
 - Thought leadership and publications
 - Proprietary tools or data
 - Signature, high-visibility projects
- Refine when relevance fades. If your differentiator becomes less relevant to buyers—or too many firms claim the same thing—be ready to sharpen or shift it using the same 5-step process again.

By following this checklist, you can move away from competing on price and start winning with a clear, compelling, authentic differentiation strategy that attracts your ideal clients.

Reach out to me for help on creating your differentiation plan.



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