



DEMAND ENGINEERING RESOURCE

# The Positioning Audit

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How to find and fix the revenue leak in your B2B technical consulting firm.  
A step-by-step framework for founders and principals who win on  
expertise but struggle to be seen.

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## INTRODUCTION

# The Revenue Leak You Cannot See

Most technical consulting firms do not have a sales problem. They have a visibility problem. And visibility is a positioning problem.

There is a specific moment founder-led technical firms hit a wall. The referrals slow down. A deal goes to a competitor with worse technology but better packaging. A new service line launches to silence. The pipeline is project-dependent and lumpy, and there is no repeatable system to fix it.

The expertise was never the problem. The system to turn it into revenue was.

This playbook documents the exact process we use to diagnose and fix that system. It is structured around a real engagement with a firm that had been operating for over 35 years, held elite technical certifications, had worked with some of the largest clients in their industry, and still had a homepage that said nothing meaningful to a senior buyer.

We call this process the **Positioning Audit**. It runs through three phases and twelve steps. At the end of each section, you will find a self-assessment checklist. These are the exact questions we ask before we write a single word of messaging for a client.

Work through them honestly. The questions you cannot answer are where your revenue is leaking.

**HOW TO USE THIS DOCUMENT**

Read each section as a framework first. Then use the checklist at the end of each phase to audit your own firm. If you can answer every question clearly and specifically, your positioning is solid. If you cannot, you have found the leak.

**WHAT THIS COVERS**

- Phase 0: Research and Intelligence Gathering
- Phase 1: The Seven Strategic Lenses
- Phase 2: Foundation — The Positioning Layer
- Self-assessment checklists at every step

**WHO THIS IS FOR**

Founders and principals at B2B technical consulting firms in AI/ML, cybersecurity, FPGA, telecom, compliance, or defense who rely on referrals and know their pipeline is not as predictable as it should be.

## PHASE 0

# Research and Intelligence Gathering

Before any strategy is written, the goal is to understand the firm from the outside in — the same way a prospective buyer or a competitor would see it.

Most positioning work fails before it starts because it begins with internal assumptions. The firm describes itself the way it sees itself, not the way buyers see it. The Positioning Audit starts outside the building and works in.

**STEP 1**

## Audit the Website

Pull every page. Homepage, about, all service pages, case studies, news. Read it as a senior buyer who does not know the firm.

**What to look for:** How the firm describes itself. What language is used (technical vs. business outcome). What proof points are surfaced. What the calls to action are and where they appear.

**WHAT WE FOUND**

The firm's site was written for engineers, not buyers. It listed certifications and technical capabilities accurately but did not translate them into business outcomes. A non-technical senior buyer had no clear next step.

**STEP 2**

## Map the Competitive Landscape

Research the industry broadly. Identify national integrators, regional boutiques, and adjacent players. Pull how they describe themselves and what categories they compete in.

**What to look for:** Where the firm is genuinely differentiated vs. where it is similar. What categories exist in the market and which ones are commoditized.

**STEP 3**

## Extract Proof Points

Pull all case studies, testimonials, client names, and measurable outcomes from the firm's existing materials. Catalogue every quote and every result.

**WHY THIS MATTERS**

Proof points are the most underused asset in technical services marketing. Most firms have excellent proof sitting on their site that is not being used in their positioning or messaging.

**PHASE 0 SELF-ASSESSMENT**

- Can you read your own homepage as a non-technical senior buyer and understand exactly what problem you solve?
- Do you know which three competitors your best-fit buyers are also evaluating?
- Have you catalogued every client name, testimonial, and measurable outcome from past engagements?
- Do you know what category your competitors claim and whether you are differentiated within it?

## PHASE 1

# The Seven Strategic Lenses

Once research is complete, work through seven structured analytical lenses. Each builds on the previous, moving from descriptive (what is true) to prescriptive (what should be done).

**LENS 1**

## Competitive Alternatives

"What would customers do if your firm didn't exist?"

Segment by buyer type and map the realistic next-best option for each. This is not about listing competitors by name. It is about understanding the full range of substitutes, including doing nothing, hiring a generalist, or building internal capability.

**Why it matters:** The alternatives reveal what the firm is actually being compared against in a buyer's mind. The specific compromises buyers accept when they choose an alternative become the foundation of the value proposition.

**LENS 2**

## Unique Attributes

"What capabilities do you have that the alternatives genuinely lack?"

Identify the specific attributes that are difficult or impossible for competitors to replicate. Force the discipline of distinguishing between "things we do well" and "things only we can do."

**Why it matters:** Most technical firms can list their capabilities. Very few can articulate which of those capabilities are genuinely unique. This step is where the real differentiation lives.

**LENS 3**

## Value and Proof

"What specific outcome does each unique attribute deliver and what is the evidence?"

For each unique attribute, map the direct business outcome it produces for the buyer. Then find the real proof point from the firm's existing track record to back it up.

**Why it matters:** Features without value are a spec sheet. Value without proof is a claim. This lens connects all three: the capability, the outcome, and the evidence.

**LENS 4**

## Target Market Characteristics

"What are the specific characteristics of the buyers who care most intensely about your value?"

Define the ICP by situational and psychological characteristics, not just firmographics. Zero failure tolerance. Regulatory urgency. Complex environments. Preference for independent advisors.

**Why it matters:** Firmographic ICPs tell you who to call. Characteristic ICPs tell you who actually buys and why. The goal is to identify buyers who feel the most pain, because those buyers pay a premium and close fastest.

**LENS 5**

**Market Category**

"What category should you describe yourself as being part of?"

Evaluate the available category options from commoditized to premium. The category you claim determines your competitive set, your pricing power, and the expectations buyers bring to the table before you say a single word.

**Why it matters:** Category choice is one of the highest-leverage positioning decisions a firm can make. Most technical firms default to the commoditized category because it feels accurate. Accurate is not the same as optimal.

**LENS 6**

**Relevant Trends**

"What macro trends are your target buyers already tracking that make your services more urgent right now?"

Identify two or three trends your ICP is already worried about. Map how each trend directly amplifies the urgency for your specific capabilities.

**Why it matters:** Trends create timing. A firm that connects its services to a trend the buyer is already tracking becomes a solution to an immediate problem, not a vendor to evaluate someday.

**LENS 7 (BONUS)**

**GTM Infrastructure Audit**

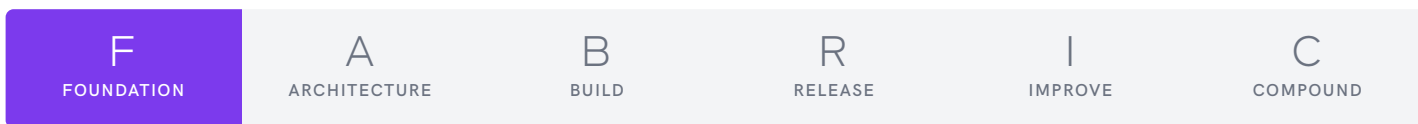
"Where specifically is revenue leaking in your current go-to-market?"

Document the current state of the firm's go-to-market infrastructure and identify the specific revenue leaks. In our engagement, we consistently find three:

<b>The Technical Translation Gap</b>	Messaging written for engineers, not buyers. The firm's expertise is real but invisible to the decision-maker who controls the budget.
<b>The Commoditization Trap</b>	No premium category ownership. The firm competes on price because it has not claimed a category that commands a premium.
<b>Reactive Trigger Capitalization</b>	Waiting for inbound rather than intercepting buyers at the moment of crisis. The trigger events exist but the firm is not positioned to capture them.

**PHASE 1 SELF-ASSESSMENT — THE SEVEN LENSES**

- Can you name the three most common alternatives buyers choose when they do not hire you?
- Can you name two capabilities your firm has that a generalist competitor genuinely cannot replicate?
- For each unique attribute, can you name a specific client outcome and a proof point?
- Can you describe your best buyer's situation in their words, not yours?
- Have you consciously chosen a market category, or are you using the default one?
- Can you name two trends your ICP is tracking right now that make your services more urgent?
- Do you know which of the three revenue leaks is the primary constraint in your business right now?



PHASE 2

# Foundation – The Positioning Layer

With the seven lenses complete, you have all the raw material needed to build the Foundation phase deliverable. This is where research becomes strategy.

**STEP 10**

### Lock the ICP and Trigger Events

Using the target market characteristics from Lens 4, define two to three specific Ideal Customer Profiles with firmographic criteria, psychographic profiles, and the specific trigger events that cause each buyer to enter the market urgently.

**THE TRIGGER EVENTS ARE THE MOST IMPORTANT PART**

They tell you exactly when to reach out, what to say, and why the buyer is ready to act. Without trigger events, your outreach is random. With them, it is precise.

**Common trigger events for technical consulting firms:**

- Regulatory mandate or code change forcing compliance
- New construction or infrastructure project requiring specialist
- Failed internal attempt or vendor failure
- Leadership change or new budget cycle
- Competitive pressure or market entry by a new player

**STEP 11**

### Build the Positioning Stack

Write the core positioning statement: the category the firm owns, the differentiation that holds, and the core value proposition. Then build the messaging architecture — a translation table that maps each buyer persona and trigger event to the specific business-outcome message that will resonate.

POSITIONING STACK COMPONENT	WHAT IT ANSWERS
Category	What market are we in?
Differentiation	Why us over the alternatives?
Value Proposition	What specific outcome do we deliver?
Proof	What evidence backs the claim?
ICP + Trigger	Who is ready to buy and why now?

**STEP 12**

### Rewrite the Homepage

The homepage is the first test of whether the positioning stack works. Every section should map to a component of the stack. The hero answers "what do you do and for whom." The proof section answers "why should I believe you." The services section answers "what specifically do you build."

## Phase 2 Self-Assessment

Before moving to Architecture, answer each question honestly. Any question you cannot answer is a gap that will compound downstream.

### FOUNDATION — THE POSITIONING LAYER

- Have you written a positioning statement that a non-technical buyer could repeat back to you?
- Do you have a defined category that is premium rather than commoditized?
- Have you identified the specific trigger events for each ICP?
- Does your homepage hero describe the buyer's situation before it describes your firm?
- Can every member of your team describe what you do in the same words?
- Do you have a messaging table that maps buyer personas to specific messages?

#### WHAT TO DO WITH YOUR RESULTS

If you answered yes to all six questions, your Foundation is solid. Move to Architecture.

If you answered no to one or two, you have identified the specific gaps. Address them before building outbound or content — every downstream activity will be more effective once the Foundation is locked.

If you answered no to three or more, the positioning work is the highest-leverage thing you can do right now. Everything else is premature.

## BEYOND FOUNDATION

# Foundation Is Phase One. Revenue Is the Output.

The Positioning Audit gets the Foundation right. But Foundation is only the first phase of the FABRIC™ System. The firms that compound revenue are the ones that build the full architecture.



Foundation is the positioning layer. It is the work this playbook covers. When it is done correctly, every downstream activity — outbound, content, paid, referral — becomes more effective because it is aimed at the right buyer with the right message at the right moment.

Architecture is the system design. It maps the exact channels, sequences, and infrastructure needed to move buyers from unknown to qualified. It answers: what does the revenue engine actually look like?

Build is the execution layer. This is where the assets, sequences, and content are created. Not campaigns. Infrastructure.

Release is the activation. The system goes live. Outbound starts. Content publishes. The firm begins intercepting buyers at the moment of trigger rather than waiting for referrals.

Improve is the feedback loop. Every week, the data tells you what is working and what is not. The system gets sharper.

Compound is the outcome. A revenue engine that does not require the founder to be personally involved in every deal. A pipeline that is predictable, not lumpy. A firm that wins on expertise and on visibility.

## Want Us to Run This on Your Firm?

We run the full Positioning Audit as the first phase of every FABRIC™ engagement. If you completed the self-assessment checklists and found questions you could not answer, those are the exact gaps we fix. The audit takes two weeks. The output is a complete positioning stack, locked ICP with trigger events, and a rewritten homepage.

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