

What happens in a B2B messaging workshop?

It's something we get asked to do more and more – but what exactly happens in a messaging workshop, how long will it take, and what will you get out of it? Here's our guide for marketers.

Before you start writing any marketing materials, it's helpful to know what it is you want to say, and to whom. You have to be sure that what you say will resonate with the person or people you want to say it to. And you have to be sure that everyone who writes (or speaks) for your brand is saying broadly the same things, so your proposition sounds and feels consistent.

Essentially, you need a core set of messages that everyone can use as a foundation for their external communications.

The basic aim of a messaging workshop is to establish what those messages are, and to capture them in a document that's easy to share with everyone who will be writing and speaking on behalf of your brand.

Who should be involved in the workshop?

Unless you're a very small business, you're bound to have more than one person who has a say in how you communicate with your market. A workshop gets all of those people together in one room to share their views and come to a consensus. Different people bring different – but equally valid – perspectives. A product manager will have a good idea of what's interesting about the product. A salesperson or consultant will have great insight into the problems customers need help with. A marketing person may have the best knowledge of what competitors are offering, and how to stand apart from them.

You'll probably also want an external facilitator. There's nothing to stop you running a messaging workshop internally, but the risk is that a lack of an external perspective leaves participants believing that what they want to say is what the customer wants (and needs) to hear.

What the workshop really needs is someone external to perform four key functions:

- Facilitate the session, to tease out the information that will form the messages
- Challenge any messaging that seems self-serving rather than customer-focused
- Provide a balanced, external perspective
- Mediate any differences of opinion

Here's how it works

Different agencies run messaging workshops in different ways, but here's a rough guide to how we do it:

Before the workshop

Preparation and communication before the event are important parts of making sure everyone gets the most from the workshop itself. Workshop prep usually includes:

- **A call or meeting** to establish what you want to achieve, who's planning to come to the session, and which competitors and customers we should research. Also, we'll confirm logistics like timing, facilities in the room, and whether anyone's joining by Skype.
- **Basic competitor research** to give some context and help us to see how your offer can stand out. This usually involves analysing their main messaging on the web or other marketing materials.
- **Short customer interviews** with three or four customers, to find out why they chose you, what you're like to work with, and where your strengths and weaknesses lie. This can be an enlightening exercise in itself.

The workshop itself

Our view is that you're not creating messages in a vacuum: you want to come up with a set of messages that actually resonate with your target audience. So we'll spend a lot of time in the workshop looking in detail at who your target audience is, what problems they're trying to overcome, and what they need help with.

We'll ask whether different audience personas have different needs, and we'll discuss the different options your prospects have on the table – including the all-too-tempting option of doing nothing – and what might spur them to choose your product or service. We'll also spend time exploring exactly what you're selling: what it is, what it does, and how it's better than what your competitors are offering. And we'll press you for proof points: evidence to back up what you're saying.

Throughout these discussions we'll be capturing everyone's thoughts, ready for us to turn into a first draft of your messaging framework.

Your Messaging Framework

Usually, the output of the workshop is a document that sets out your key messages. The format of the document will vary depending on the scope of your messaging project, but typically it might include:

Introduction: What the document is for, how it can be used, and by whom.

Target persona(s): Who you're selling to, what their responsibilities and motivations are, their buying triggers and what they're looking for in a solution or provider.

Value proposition: A succinct summary of the value you offer to your primary audience.

Key messages: The main things you want the audience to know (or feel) about your brand, product or service. If you like, we can supply these as "copy blocks" that can be copied and pasted directly into marketing, sales and PR materials.

Supporting messages: Secondary messaging to support the key messages. These can also be copy blocks.

Proof points: Concrete evidence that shows what you're saying is true – for example, statistics, customer names and testimonials, analyst quotes or certifications.

Strapline options: Often used as part of the brand mark, the strapline is a concise and memorable expression of your value proposition. We'll usually give you three options to choose from.

Elevator pitches: A hardworking piece of copy that can be used in slide decks, "About Us" pages, press release boilerplates, LinkedIn profiles, etc. to explain succinctly what the brand, product or service is about. We provide 25-word, 50-word and 100-word versions for use in different contexts.



It's unlikely any external writer will get everything you want to say absolutely bang-on, first time. That's why we consider first draft approval to be a bad thing – and why we allow for up to two rounds of edits to the messaging framework.

We give you a few days to review, then we schedule a meeting or call with you to go through your feedback.

If we're doing our job properly, the next version will be very near to final – perhaps even the final version. If it's not quite there, we'll apply one more round of amends to get it ready for you to share with your marketing, sales, and PR teams at will. Then we'll deliver that finalised document as a PDF, Word doc or PowerPoint – whichever works best for you.

Sounds wonderful – but how much is all this going to cost me?

Aha, the million-dollar (not literally, you'll be relieved to read) question. We find that messaging projects tend to differ quite a lot in scope, so we don't have a standard price for one. But if you request our pricing guide, it will give you an idea of the kind of investment you'd be looking at.

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And if you'd like to discuss a messaging project with us directly, do give us a call on +44 (0)1326 373592, or email info@radix-communications.com.