MessageSpecs Workshop

Hi there! Use this document as a guide to the MessageSpecs Method or to follow along during a workshop and capture your best market messaging as we go!

Why this workshop?

Simply put, you can't compete on technical details alone. To be successful, you sometimes have to look beyond what's in front of you to discover the marketing messages and cultural hallmarks that make you unique among your peers and across your market.

The cards and exercises below provide prompts built on my 25-year experience inside IT, cybersecurity, and product development organizations and from the outside looking in as a brand strategy and marketing consultant.

Whether your workshop is facilitated by myself or self-guided, we're in this together. Contact me any time at joel@messagespecs.com or at messagespecs.com/lets-talk. Ready to do this? Let's go!

Exercise 1: Where are you today?

Before we get started, let’s capture your current market messaging.

Take a few minutes to write down your current marketing messaging in the way you present it on your website homepage or when you introduce yourself or your solution to others.

Exercise 2: Breakdown

That's great. But let's break it down a little bit more.

(Don't worry if you don't have or know something listed right now.)

Top of mind

What is the boldest, broadest, biggest idea takeaway in your message today?

Connection

How are you connecting your solution to your audience's experience?

Value

How do you communicate your value to your audience?

Proof

How do you prove your case or your value to them?

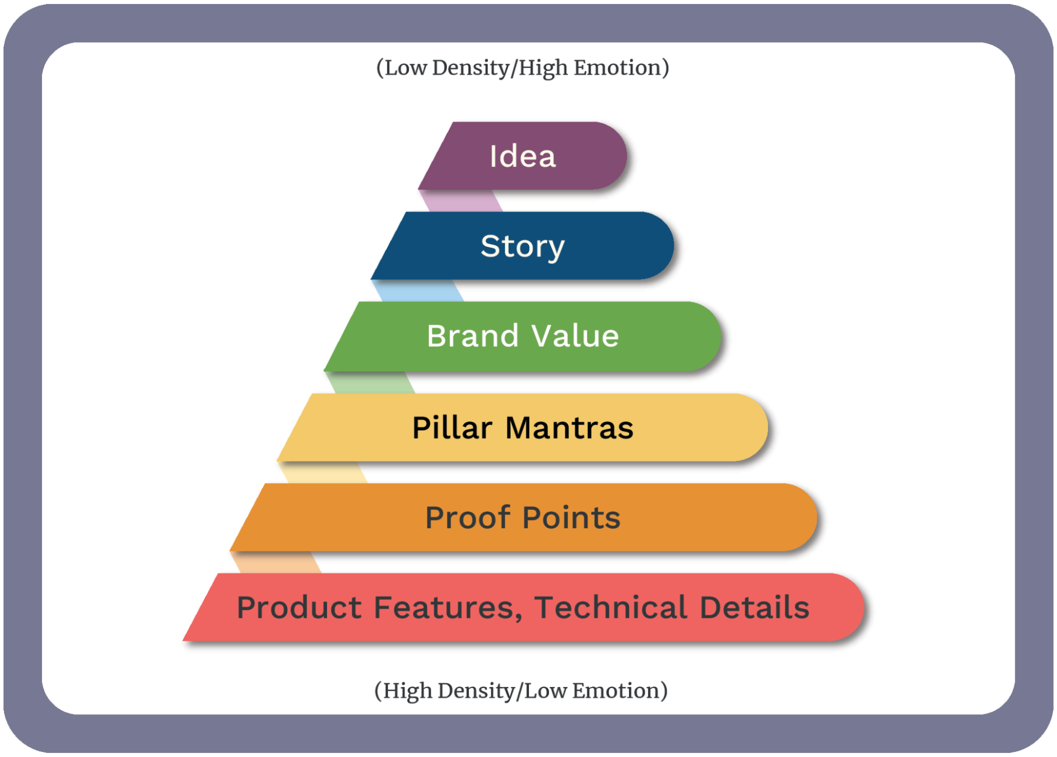
Gritty technical stuff

Now (finally) what is it you actually do, offer, or sell? (Don’t skip ahead and start here)

Exercise 3: Understanding the Framework

Briefly, our objective in this workshop is to discover and formalize the elements necessary to deliver the above messages (and more) into a messaging system that you and your team can use as a go-to when developing marketing or other communications.

To do this, we'll need a framework. Meet the **Clarity Pyramid**.


(Low Density/High Emotion)
Idea
Story
Brand Value
Pillar Mantras
Proof Points
Product Features, Technical Details
(High Density/Low Emotion)

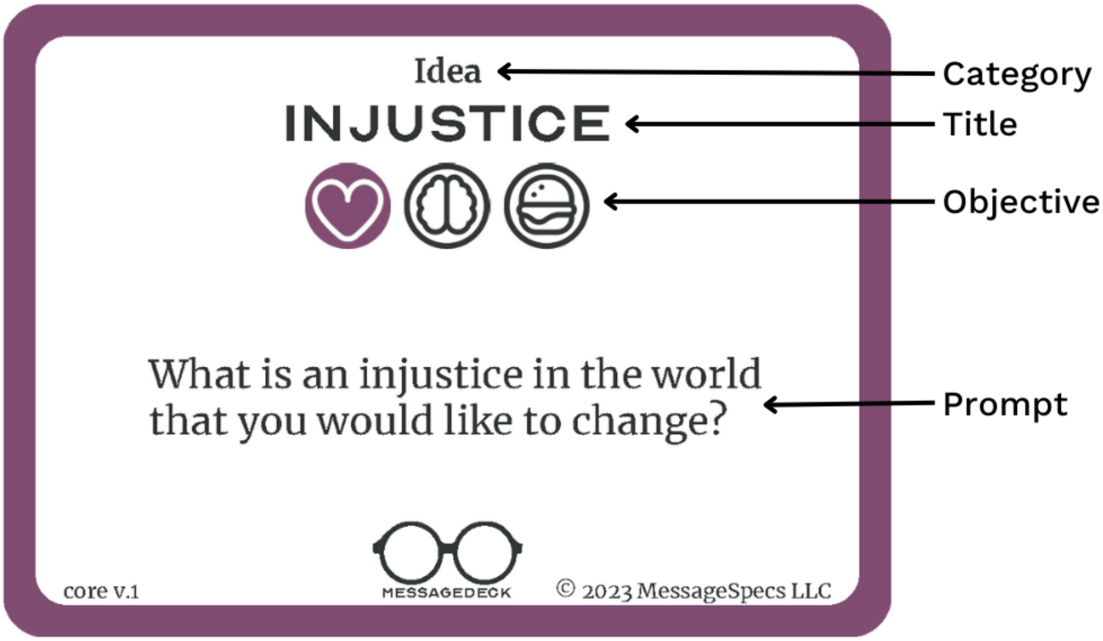
The Clarity Pyramid is a stacked hierarchy of message needs (borrowed from Maslow's hierarchy of needs, which was borrowed from the Blackfeet Native American culture).

Informationally dense but low-emotion messages like technical details or product features are the base of the pyramid. As you move upward, the concepts get less detailed and more emotionally charged.

Successful messaging needs to contain the right balance of each of these elements, as appropriate to the audience and channel. So we need to capture them all.

Exercise 4: Get to know the cards

Remove the guide cards, separate and shuffle the prompt cards into eight stacks of their respective types: **Message** (*Big Idea, Story, Value, Mantra, Proof Point, Technical*), **Focus**, **Playbook**, and **Audience** cards. (Playbook and Audience cards are only available in the Core deck and select expansions). Set the Focus, Playbook, and Audience cards aside for now.



What is an injustice in the world that you would like to change?

Each prompt card has a **Category**, **Title**, and **Prompt** that tell you where the card belongs in the exercises below and what to do with them.

Some cards have **Objectives**, which provide some guidance on which kind of reaction you should try to create with your audience—heart, head, or gut.

A filled heart icon indicates you should consider **emotion** when answering this prompt. Leverage conceptual language. Emotional appeals are largely concentrated toward the top part of the framework—Big Ideas, Stories, Values, and Mantras—but may be useful in other areas.

Emotion is important for earning **attention** and **engagement** early in your audience's journey, also referred to as "top of funnel" activities in marketing terms.

A filled brain icon indicates you should consider **logic** when answering this prompt. Logical appeals contain detail and should be used in the "higher-density" message elements—Proof Points, and Technical details. You can make logical appeals in Stories and Value, but be mindful of overburdening your audience with too much.

Logic is important in the "middle funnel," where you are developing **relationships** and **educating** your audience. It justifies continued engagement.

The hamburger (or "gut") represents **credibility**. This is not an emotional appeal but is still something that audiences feel. Prompts with this filled in should be answered with an eye toward helping your audience answer the question "Do I trust this?" You'll use this heavily in Value and Proof Point messaging elements.

Credibility is critical to the **conversion** and **retention** of customers.

The Message Cards

Prompt cards correspond to the Framework levels and are represented by the six multi-colored cards of the following:

Ideas (purple)

Ideas are the big, thematic things that should permeate through your full brand story or messaging. This is your “big why” and is the most important takeaway you want from your audience after first encounter. After all, if you’re not hooking them emotionally right off the top, you may not be able to retain their attention as you move toward “deeper” subjects.

Story (blue)

We hear a lot about “storytelling” in marketing. But that doesn’t mean we need to spin fiction with our audiences. Stories are, however, how we connect with the day-to-day lived experiences of our audience. It’s how we demonstrate empathy with them and how we also share what makes us tick. When you connect on a story level, you’re beginning to move from heart feelings to gut feelings. But you have to begin weaving in some logical arguments as well.

Value (green)

These are not your corporate “mission, vision, value” stuff (those fit more in the Story or Mantra levels). These are clear articulations of the value you’re offering your audience. What are they going to get out of listening to you? These often come not from your own perspective but should be developed by listening closely to your audience. What is it they want (or don’t want)? Answer the classic “What’s in it for me?” question.

Mantras (yellow)

Mantras are phrases and concepts that are burned into your character or culture. Or they reflect the beliefs of your audience. These aren't rote marketing "taglines" or "slogans," though they do make for great ones. They must be genuine statements of culture and truth about your organization. For example, "complex does not have to be confusing." It's a statement of truth, but also represents a deeper why.

Proof Points (orange)

Proof Points build on the gut level. We've got to answer the credibility question of "why should I trust you?" But there are different kinds of proof points that should be included. Hard ones, like performance metrics and result KPIs, are obvious. Soft social proofs, like testimonials or case study stories, are also useful. But when you're making a case for a large perspective shift, you should also be looking for external proofs, like industry reports, trends, and metrics that support your case. These help you avoid bragging about yourself and let someone else's words do it for you.

Technicals (red)

Finally, the one you've been waiting for—technical details. Many technologists feel they have these down, but they're often scattered or spread across several pieces of collateral in the wild. Collecting all the details in a catalog of technical messages helps you know which ones to use when, and in what balance against other "lighter" messages.

Technical prompts also provide questions you may not have considered about your solution. But they are things that are on your audience's mind. So be prepared to answer them with messaging elements.

Exercise 5: Selecting and answering message prompts

Selecting cards

Throughout the workshop, you'll be pulling cards from these stacks. You can do this from top to bottom or you can do it randomly using coin flips, dice, mud wrestling, or other feats of strength—whatever works for you.

> **Note**: Using a six-sided, multi-colored die can make things very interesting. You can select either the stack by color or number. These dice are available in the MessageShop.

After you select a few prompts at random from each category, your facilitator may wish to look through the remaining prompts to select a few specific ones and guide the exercise.

You do not have to get through all the cards. So don't worry about that.

Answering prompts

Whoever is leading the session should pull the relevant prompt card from the stack and read it out loud to the participants. DO NOT START A CONVERSATION ABOUT IT!

You'll have time to talk through your ideas shortly. The power of the MessageDeck method is allowing everyone to get their ideas "out onto the table" equally before the discussion.

If everyone has a deck of their own, they can flip the card over and write what comes to their head on the back. Otherwise, use sticky notes, index cards, fortune cookie fortunes, or any other slips of paper to write down the messaging point that comes to mind.

> **Note:** The MessageDeck system uses category labels and color coding to indicate the prompt category. So use similarly-colored notes or write down the prompt category on the notes so you're able to group them later.
>
> I recommend these notecards (https://amzn.to/3XIFIOc) or these sticky notes (https://amzn.to/3pFmD2H) from Amazon.

This is the bulk of your workshop time. Use as much time as necessary to gather a decent amount of inputs per framework section.

As prompts are answered, the facilitator may guide the conversation by challenging the answers (see "Challenging Inputs" below) or engage the participants in brief discussions to clarify answers. They may also allow participants to discuss similar answers to come to an agreement on phrasing. Update inputs as necessary during this discussion.

Challenging inputs (Focus cards)

The white **Focus** cards may be used by the facilitator during the discussion phase. These cards represent "devil's advocate" positions or other statements that can help the participants test or refine their thinking. They may be used to ask a participant to reconsider their input, provide more detail, rephrase their answer, etc.

Update inputs as necessary during this discussion.

Focus cards may be used more than once.

Exercise 6: Architect the Message Foundation

Now that you and your team have gotten everything out of your heads and onto the table (literally), you should have a large number of messaging elements that you *might* want to include in your marketing. However, it's now time to make some decisions about what you *should* and *will* include.

Your **Message Foundation** is a system accessible to your full team and serves as a guide for market messaging that sticks in the minds of your audience and scales across multiple channels. It serves as a set of "first principles" for messaging.

Use the following exercises to down-select and refine your message elements into your Message Foundation. These may be used in any order, but are listed here in a general recommended order.

1. Collect and compare

Collect inputs together in groups of prompt types so you're able to look across all Big Ideas, Stories, Values, etc. to compare them to one another. You're looking for similarities and differences in the *clarity of thought*—the sentiment and intent of the input. You should also be looking for similarities in the verbiage used.

2. Cluster

Once a large number of inputs have been collected, the group may collectively look through the answers and look for alignment (similar answers), and cluster them together. You may also begin to align top-to-bottom "story stacks" of inputs that loosely fit together to convey larger ideas. In this way, you're testing the inputs to determine if they feel right to you when used together.

3. Cull

Be critical of outliers and thoughts that don't seem to fit in with the overall thematics of the whole messaging structure. It's okay to discard thoughts at this point. There may also be half-baked thoughts that need to be rewritten or combined.

4. Audience cards

Audience cards (available in Core and some expansion decks) are used to put your team in the shoes of your target audiences. They can also help you discover other audiences that are critical to your marketing success, like stakeholders or downstream consumers. Use the Audience cards to develop personas or profiles of these roles. As you answer the prompts on the Audience cards, write down a full profile of your audience.

5. Playbook cards

As your Messaging Foundation begins to become more firm, use Playbook cards (available in Core and some expansion decks) to game out potential campaigns or communication activities. A Playbook card provides a situation where you will need to create a campaign message. It also provides some recommendations for how to balance the heart, head, and gut objectives.

Playbooks and Audience cards can be used together to pivot a campaign from one audience to another or to create a multi-channel campaign plan.

Post-Workshop: Build the Messaging System!

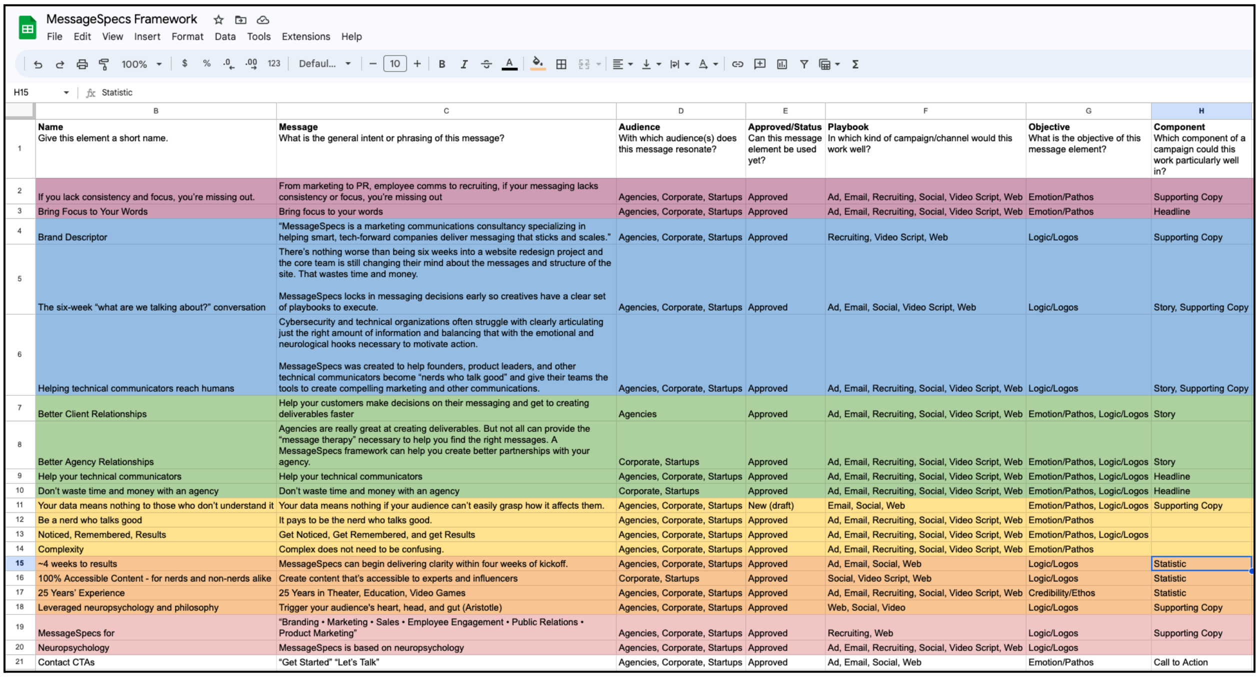
Don’t let all this work go to waste! With a fully-fleshed Message Foundation on the table, it’s time to put it into action. FIRST, take photos of the cards before a gust of wind blows them away. THEN put your new message framework into a location where your team can reference it.

This can be in a document posted on your intranet. But that’s boring. “Marketing guides” and “brand documents” rarely get used by a broad team, if they’re read at all.

Spreadsheets

At a minimum, structure your Message Foundation into an Excel or Google Sheets spreadsheet and continue to tag the elements with helpful notes, like:

- Which audience the message works best with,
- What sort of component (headline, supporting copy, call to action) they should be turned into, or
- Which objective (heart, head, or gut) they trigger.



	B	C	D	E	F	G	H
1	**Name** Give this element a short name.	**Message** What is the general intent or phrasing of this message?	**Audience** With which audience(s) does this message resonate?	**Approved/Status** Can this message element be used yet?	**Playbook** In which kind of campaign/channel would this work well?	**Objective** What is the objective of this message element?	**Component** Which component of a campaign could this work particularly well in?
2	If you lack consistency and focus, you're missing out.	From marketing to PR, employee comms to recruiting, if your messaging lacks consistency or focus, you're missing out	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos	Supporting Copy
3	Bring Focus to Your Words	Bring focus to your words	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos	Headline
4	Brand Descriptor	"MessageSpecs is a marketing communications consultancy specializing in helping smart, tech-forward companies deliver messaging that sticks and scales."	Agencies, Corporate, Startups	Approved	Recruiting, Video Script, Web	Logic/Logos	Supporting Copy
5	The six-week "what are we talking about?" conversation	There's nothing worse than being six weeks into a website redesign project and the core team is still changing their mind about the messages and structure of the site. That wastes time and money. MessageSpecs locks in messaging decisions early so creatives have a clear set of playbooks to execute.	Agencies, Corporate, Startups	Approved	Ad, Email, Social, Video Script, Web	Logic/Logos	Story, Supporting Copy
6	Helping technical communicators reach humans	Cybersecurity and technical organizations often struggle with clearly articulating just the right amount of information and balancing that with the emotional and neurological hooks necessary to motivate action. MessageSpecs was created to help founders, product leaders, and other technical communicators become "nerds who talk good" and give their teams the tools to create compelling marketing and other communications.	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Logic/Logos	Story, Supporting Copy
7	Better Client Relationships	Help your customers make decisions on their messaging and get to creating deliverables faster	Agencies	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos, Logic/Logos	Story
8	Better Agency Relationships	Agencies are really great at creating deliverables. But not all can provide the "message therapy" necessary to help you find the right messages. A MessageSpecs framework can help you create better partnerships with your agency.	Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos, Logic/Logos	Story
9	Help your technical communicators	Help your technical communicators	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos, Logic/Logos	Headline
10	Don't waste time and money with an agency	Don't waste time and money with an agency	Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos, Logic/Logos	Headline
11	Your data means nothing to those who don't understand it	Your data means nothing if your audience can't easily grasp how it affects them.	Agencies, Corporate, Startups	New (draft)	Email, Social, Web	Emotion/Pathos, Logic/Logos	Supporting Copy
12	Be a nerd who talks good	It pays to be the nerd who talks good.	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos	
13	Noticed, Remembered, Results	Get Noticed, Get Remembered, and get Results	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos, Logic/Logos	
14	Complexity	Complex does not need to be confusing.	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Emotion/Pathos	
15	~4 weeks to results	MessageSpecs can begin delivering clarity within four weeks of kickoff.	Agencies, Corporate, Startups	Approved	Ad, Email, Social, Web	Logic/Logos	Statistic
16	100% Accessible Content - for nerds and non-nerds alike	Create content that's accessible to experts and influencers	Corporate, Startups	Approved	Social, Video Script, Web	Logic/Logos	Statistic
17	25 Years' Experience	25 Years in Theater, Education, Video Games	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Credibility/Ethos	Statistic
18	Leveraged neuropsychology and philosophy	Trigger your audience's heart, head, and gut (Aristotle)	Agencies, Corporate, Startups	Approved	Web, Social, Video	Logic/Logos	Supporting Copy
19	MessageSpecs for	"Branding • Marketing • Sales • Employee Engagement • Public Relations • Product Marketing"	Agencies, Corporate, Startups	Approved	Recruiting, Web	Logic/Logos	Supporting Copy
20	Neuropsychology	MessageSpecs is based on neuropsychology	Agencies, Corporate, Startups	Approved	Ad, Email, Recruiting, Social, Video Script, Web	Logic/Logos	
21	Contact CTAs	"Get Started" "Let's Talk"	Agencies, Corporate, Startups	Approved	Ad, Email, Social, Web	Emotion/Pathos	Call to Action

You can view and copy a sample Google Sheet framework here.

Custom Decks

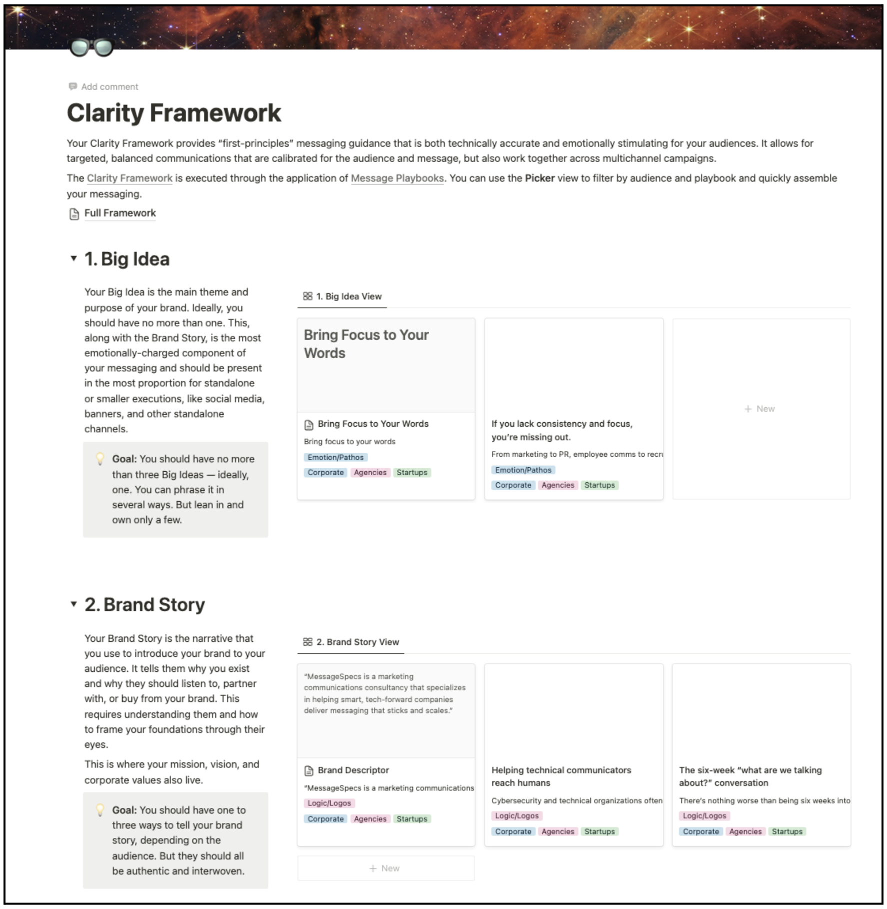
Even better than a spreadsheet is a custom MessageDeck with your best messaging elements printed right on the cards. Use these for onboarding new team members or brainstorming new campaigns.

Contact me at messagespecs.com/lets-talk to learn more about getting your custom MessageDeck designed and printed.

Messaging Hubs

Even better-er than a spreadsheet or custom deck, create a living, breathing message resource for your team using Notion (yay!) or SharePoint (not as yay). These dynamic hubs allow you to provide supporting documentation and guides (like formal Playbooks) to guide your team and marketing partners in implementing your new messaging.

They can also provide a feedback loop by enabling your team to add notes or new findings.



Clarity Framework

Your Clarity Framework provides "first-principles" messaging guidance that is both technically accurate and emotionally stimulating for your audiences. It allows for targeted, balanced communications that are calibrated for the audience and message, but also work together across multichannel campaigns.

The Clarity Framework is executed through the application of Message Playbooks. You can use the **Picker** view to filter by audience and playbook and quickly assemble your messaging.

Full Framework

1. Big Idea

Your Big Idea is the main theme and purpose of your brand. Ideally, you should have no more than one. This, along with the Brand Story, is the most emotionally-charged component of your messaging and should be present in the most proportion for standalone or smaller executions, like social media, banners, and other standalone channels.

Goal: You should have no more than three Big Ideas — ideally, one. You can phrase it in several ways. But lean in and own only a few.

Bring Focus to Your Words

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Emotion/Pathos
Corporate Agencies Startups

If you lack consistency and focus, you're missing out.
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Emotion/Pathos
Corporate Agencies Startups

2. Brand Story

Your Brand Story is the narrative that you use to introduce your brand to your audience. It tells them why you exist and why they should listen to, partner with, or buy from your brand. This requires understanding them and how to frame your foundations through their eyes.

This is where your mission, vision, and corporate values also live.

Goal: You should have one to three ways to tell your brand story, depending on the audience. But they should all be authentic and interwoven.

"MessageSpecs is a marketing communications consultancy that specializes in helping smart, tech-forward companies deliver messaging that sticks and scales."

Brand Descriptor
"MessageSpecs is a marketing communications
Logic/Logos
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The six-week "what are we talking about?" conversation
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Logic/Logos
Corporate Agencies Startups

You can view a read-only example of a Notion Message Hub here.

Rinse and Repeat

Visit and update your Framework often, adding new message elements as you discover what works best for your audiences in the wild.

Periodically gather your team for a mini MessageDeck exercise to answer new prompts or see where the culture or tone of your organization may have shifted.

In Summary

The MessageDeck Method is more than a “card game” or a “tabletop tool,” though it’s good to use in that way. At its core, the Message Objectives, Framework, and System are a mindset to help your team develop balanced market messaging that meets your audiences where they are. It’s about helping you get noticed, get remembered, and get results.

My hope for you is that you discover something new about your organization that creates a spark of inspiration for fresh, effective messaging that helps you achieve your business goals.

Thank you for investing in me and your own success.

Joel Benge

Principal, MessageSpecs