

THE POSITIONING MATRIX™

by Marty Marion



**THE SCIENCE OF BRAND
POSITIONING & DE-POSITIONING
TO OUTFLANK COMPETITORS,
DOMINATE YOUR NICHE
AND EXPLODE YOUR REVENUE**

*From the Founder of the Private FB Group
Master Positioning Insiders*

1 CORE POSITIONING & THE POSITIONING PLATFORM

1.1 Defining the Importance of Positioning

Simply put, 'positioning' is the science of **controlling consumer decisions** about, and behaviors (including buying decisions) **in favor of** your specific brand, product or service and **away** from your competitors' brands, by influencing their beliefs about your brand and your competitor's brands.

Often inaccurately referred to as 'branding', a brand's 'persona', 'your USP' and other terms, **positioning** is the single most important element that assures brand success. Done right, brand success is virtually assured. Done wrong, or not done at all will ensure failure.

Positioning has a major impact on all aspects of marketing, including SEO, ads, social media and website content, as well as virtually every channel of messaging. The concept of brand positioning is widely accepted as the single most important factor in determining a brand's ability to establish itself as the **preferred brand** within any given niche or category in the mind of the target consumer. It is the basis of all successful strategic planning undertaken on behalf of brands by the world's leading advertising and marketing agencies as well as by the brand owners themselves.

The premise of why creating a compelling brand positioning is so critical is guided by the following determinants:

1. For every product or brand in any category, consumers assign a mental preference ranking. This results in the consumer believing that brand X is the 'best' brand for them in the category being considered, or the brand that most fulfills their needs.

For example, John may believe that ABC is the best toothpaste for him, and Jane may believe that XYZ is the best toothpaste for her. It follows that John will buy ABC brand toothpaste, and Jane will buy XYZ brand toothpaste. If everyone believed that ABC brand toothpaste was the best for them, ABC brand toothpaste would be the biggest selling and most successful product in its category.

The theoretical objective of any brand is to attain the 'Number 1' position in the mind of the largest number of target consumers, thus making the brand the largest selling brand in that category and generating the highest revenue.

2. While there is ample room for a top 1, 2 or 3 brands in any category to be hugely successful, there can only be ONE number 1 brand; and positioning is the science that helps a brand achieve this state.

In the marketing journey to become the number 1 brand in a category, positioning is the most powerful marketing technique to create competitive advantage.

1.2 Become The Number 1 Brand In Your Niche

There are only TWO ways to become a number 1 brand in any category:

- ▶ Displace the incumbent number 1 brand, or...
- ▶ Create a **new category**, which by default makes you the number 1 brand

The most successful brands in every imaginable niche have always opted for the second path: allow others to spend the large dollars required to pave the way and then create an ancillary category – which we call a '**Category Class**' (also mistakenly referred to as a 'sub-niche') with an entirely new, bold and disruptive positioning that generates massive competitive advantage.

Instead of being a small fish in a big pond, it's more successful to create a new pond (and be the biggest fish in that pond), and then grow the pond – forcing other brands to go on the defensive, while you take an increasing share of their market away from them.

And it's all based on the challenge of controlling consumer beliefs, which in turn controls their buying behavior.

1.3 You Cannot Easily Change Beliefs, So You Have To Influence Perceptions

Consumers **BEHAVE** according to their **BELIEFS**:

- ▶ Vegetarians don't eat meat, because they BELIEVE it's not right (either for health reasons, or for animal cruelty reasons).
- ▶ Buyers of hybrid or electric vehicles do so because they BELIEVE they are better for the environment, or for financial reasons, or both.
- ▶ Consumers make repeat purchases of their favorite brands because they BELIEVE these products work just fine for them; there's no urgency or need to change.

But beliefs are almost impossible to change once they are fully formed. So how does a brand come to control beliefs?

Beliefs don't just happen... they are built on a series of user experiences, consumer education, and marketing of messages called **INFLUENCE MOMENTS**. Influence moments aggregate to eventually form beliefs.

If our objective is to control or direct beliefs, our first task must be to understand what generates an influence moment.

The answer is one level lower down the scale, with micro-signals – **PERCEPTIONS** – that consumers are exposed to both intentionally and accidentally. Perceptions add up and create influence. Influences add up and form beliefs.

Perceptions are relatively easy to influence, and when deployed smartly, the science of positioning and de-positioning can both:

- ▶ Influence consumers in your direction **BEFORE** they have formed a belief in favor of one of your competitors, and/or...
- ▶ Create **DOUBT** or **DISSATISFACTION** (the ONLY 2 factors that have the power to change a formed belief) about the competitor's product or service.

1.4 A Few Classic Examples Show How This Is Done

Two examples will suffice to show how this works (but more than 50 years of market research show that **EVERY successful brand has adopted this approach**).

EXAMPLE 1: MOUTHWASH

First formulated by Dr. Joseph Lawrence and Jordan Lambert in St. Louis, Missouri in 1879 as a surgical antiseptic, **Listerine** was given to dentists for oral care in 1895 and it was the first over-the-counter mouthwash sold in the United States in 1914.

According to Freakonomics:

Listerine, for instance, was invented in the nineteenth century as powerful surgical antiseptic. It was later sold, in distilled form, as both a floor cleaner and a cure for gonorrhea. But it wasn't a runaway success until the 1920s, when it was pitched as a solution for "chronic halitosis" - a then obscure medical term for bad breath.

Listerine's new ads featured forlorn young women and men, eager for marriage but turned off by their mate's rotten breath. "Can I be happy with him in spite of that?" one maiden asked herself. Until that time, bad breath was not conventionally considered such a catastrophe. But Listerine changed that. They **positioned the benefit** of NOT having horrible breath, and **de-positioned the consequences** of having halitosis.

As the advertising scholar James B. Twitchell writes, "Listerine did not make mouthwash as much as it made halitosis." In just seven years, the company's revenues rose from \$115,000 to more than \$8 million.

The Back-Story

In this way, Listerine became a clear and early example of a larger trend: **marketing campaigns inventing problems that the product is alleged to solve. This led to the science of DE-POSITIONING.**

For over 46 years Listerine was the number 1 brand of mouthwash, because they literally invented the category of 'mouthwash'.

But it tasted like medicine. In fact, they used this negative aspect to claim a positioning that helped them keep the number 1 market share position for more than 4 decades:

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Listerine was the “taste you love to hate twice a day”, and later Listerine explained its effectiveness by stating that “Listerine kills the germs that cause bad breath”. Thus, Listerine staked the claim to the ‘medical science’ positioning for their product.

In the late 1950s, another liquid antiseptic decided to make a play for this significant category. By giving their red, cinnamon-tasting liquid to dentists, they assumed consumers at the shelf would say “hey, that’s the stuff my dentist uses, so it must be good”. The product (Lavoris) failed miserably – for one reason: the ‘medical science’ positioning was already owned by Listerine, which worked fine for consumers – people didn’t NEED a new mouthwash that was promoted as a ‘medicinal’ solution to bad breath, they already had one that worked just fine.

Lavoris made the mistake of trying to be a 'better mousetrap' and forgot that trying to unseat a number 1 brand is almost always an exercise in failure.

If they had used positioning and de-positioning science properly, they could have claimed another positioning that was as-yet unclaimed and won the mouthwash war.

Lavoris tasted good, especially compared with the medicinal flavor of Listerine. **But tasting good is not a core component of a mouthwash, which is intended to clean your mouth and breath, so they did not use this strategy. BIG MISTAKE!**

In 1966 another company (Proctor and Gamble) introduced Scope. Essentially there was no difference chemically between Scope and Lavoris. But P&G used positioning science effectively.

Their positioning claim was THREE WORDS that in a matter of 90 days placed Scope in the number 1 position: “FIGHTS MEDICINE BREATH”. This is one of the most successful DE-POSITIONING campaigns in marketing history. They **DE-POSITIONED** the market leader by creating **DISSATISFACTION** around the fact that Listerine tasted like hell, even though it worked.

Reasoning (correctly) that they could not claim the medical / science position owned by Listerine and win, **P&G literally created a new ‘Category Class’**: “good tasting mouthwash”, and not only became the number 1 selling mouthwash in the world, they also caused Listerine to react defensively (spending hundreds of millions of dollars) to introduce better-tasting Listerine formulas.

By creating a new Category Class (‘good tasting mouthwash’), which was NOT based on the core function of a mouthwash, Scope won the war quickly, decisively and very profitably.

Their new Category Class appealed to the ASPIRATIONAL and EMOTIONAL desires of mouthwash-using consumers – *not the core functional elements of a mouthwash.*

It was easily assumed by the market that any mouthwash would have at least the basic function of cleaning breath, but the market had never seen a mouthwash that actually tasted good.

EXAMPLE 2: PERSONAL COMPUTERS

Everyone knows that IBM virtually invented the category of Personal Computers (PCs). While there were kit computers before then, none took hold in the market.

IBM's 5150 was the first truly personal computing system. And it worked fine (given the technology capabilities of the day). Even at a huge price tag, it was an enormous success, virtually selling out upon its announcement. From a computing standpoint, it had everything a small computer could have for its time.

By introducing the 5150 (the "IBM PC" as it was called), IBM literally invented the category of PCs in the public mind.



IBM 5150 – First IBM PC – 1981

The Back-Story

As it turns out the IBM PC had several drawbacks that would be its un-doing.

- ▶ It was very heavy (over 30 pounds with all its components).
- ▶ It required at least 3 separate components (computer, screen and keyboard), all of which required a tangle of wires to connect to each other.

You could not easily move it from one place to another. And this was the opportunity that enabled Apple to become the giant it is today... **all based on positioning**... but mostly on the art of **de-positioning the competition** to be DISRUPTIVE in the minds of IBM PC users.

While it had been in existence since 1977, Apple Computers (as it was called back then) had been working on developing a computer operating system that would outclass the IBM operating system by miles – better graphic interface, faster performance, color screen capabilities, and more software applications.

But NONE of these functional aspects became the positioning that helped Apple win the early PC wars.

The first breakthrough personal computer that catapulted Apple to stardom was the Macintosh, introduced in 1984 – 3 full years after IBM staked claim to the PC positioning.

The Macintosh did NOT attempt to market itself as the ‘better mousetrap’ (or the ‘better PC’); that would not have worked!

They used positioning science to create an entirely new Category Class (and to **de-position** the IBM PC): while IBM owned the '**Personal Computer**' niche, Apple created and claimed the **new Category Class positioning** of the **PORTABLE Personal Computer**; it had integrated the screen and the computer into a single unit, weighing less, requiring less wiring, and being capable of actually being taken home on the weekend.

PORTABILITY was not, back then, a necessary functional requirement of a PC; it was an ASPIRATIONAL element of consumer convenience – it thus did not have to compete against IBM for the PC market, it created and thus owned its own unique Category Class

– and who wouldn't want to bring their computer home on the weekend? It even had a plastic cover and a handle on top! How cool was that?

Again, the strategy of **creating a new Category Class** that fulfilled consumers' ASPIRATIONAL desires for the product while **de-positioning the market leader** made it a winner, without having to compete financially against an entrenched giant.



Apple Macintosh – 1984

2 THE POSITIONING PLATFORM – THE ULTIMATE GOAL

Consumers have perceptions about EVERY brand – either a perception arrived at entirely by the consumer (in which case they may or may not come to the conclusion you want them to) or arrived at by the consumer due to the influence imparted by the brand’s marketing and positioning messages.

If consumers form beliefs based on perceptions and influence moments about your brand, that you do NOT control, they will form their own decisions about your brand. These might frequently NOT be the ideal beliefs you want them to hold.

The choice is to either let consumers come to a perception about your brand or control this through positioning and de-positioning science.

Obviously, the choice is simple – YOU must control those factors that influence and create the consumer perceptions that will compel them TO your brand and AWAY from your competitors. **And this is done entirely through the marketing science of positioning.**

Positioning is expressed in terms of a ‘**Positioning Platform**’, which is a statement used by the Company as the foundation for the creation of ALL marketing and promotional messages, to ensure that the perception of consumers is uniform, and most positive for the brand.

2.1 The Positioning Platform Format

A positioning platform is expressed in the following specific format:

For: (insert definition of target consumer here),
Brand X: (insert core benefit statement here),
Because: (insert reasoning and proof statement here).

For example:

For: *families with young children,*
Volvo: *is the safest SUV on the market,*
Because: *it has more side air-bags and steel struts than any other SUV.*

The Positioning Platform is NEVER used verbatim; it is used as a guide upon which all marketing messages are based. All!

To derive your brand’s Positioning Platform, we go through a process of populating the Positioning Matrix™, a mathematical model that guides the way to crafting the Positioning Platform. And the final Positioning Platform is then used to direct ALL marketing, ALL messages and content, and ALL communications from your brand to your target prospects as well as to your current customer base to compel rabid brand loyalty.

This is what results in massive competitive advantage, increased qualified traffic, more sales and conversions, and explosive revenue.

3 THE POSITIONING MATRIX™ - THE 4 ESSENTIAL ELEMENTS

3.1 The Positioning Matrix™

The Positioning Matrix™ is a formula I developed over the course of more than 35 years of working as a big agency senior executive (think 'Mad Men'), and as a marketing, strategic planning and SEO consultant to many very large brands in almost every niche imaginable.

Completing the Positioning Matrix™ properly allows the creation of the perfect combination of elements to match the dynamics of the market and competitive conditions in which the product will be promoted, properly positioned, and most importantly, how the competition will be de-positioned on a Category Class level.

There are **FOUR ESSENTIAL ELEMENTS** that are expressed mathematically in the Positioning Matrix™:

3.2 Essential Element 1: The Meaningful Benefit

The **FIRST** of the 4 critical elements that comprise the Positioning Matrix™ must present a **MEANINGFUL BENEFIT** to the target consumer or prospect.

Most companies make the mistake of incorporating what they believe is their **MOST** meaningful benefit, but this can be a **FATAL** mistake.

Look at this intentionally over-simplified example:

Choice 1: Our vitamin tablet will *help you live longer*.

Choice 2: Our vitamin tablet is *easy to swallow*.

Which one is a more meaningful benefit? Of course, it's 'living longer'. Living longer is clearly more important than swallowing a pill a little easier.

But it would be a fatal branding mistake to use that as the 'Meaningful Benefit' in building the Positioning Matrix™. Why? Because it fails to meet the **SECOND** critical element: **PROVABILITY**.

3.3 Provable and Easily Evident

The **SECOND** of the 4 critical elements that comprise a winning Positioning Matrix™ is that the 'Meaningful Benefit' promised must be easily **PROVABLE** or clearly **EVIDENT** to the consumer.

It's impossible to prove that the vitamin tablet in our example above will actually help you live longer. Who's to say you would not have lived longer if you didn't take it? Or that you did live longer because you took it? There's no way to prove this benefit, and certainly not within the few minutes of the consumer decision-making process of whether to buy our product or not.

However, it IS immediately provable and evident that the vitamin tablet is easy to swallow – just take one.

Provability makes the ‘Meaningful Benefit’ believable and give the halo effect of legitimacy and credibility to ALL your other claims and messages.

Thus, from a positioning standpoint ‘**EASIER TO SWALLOW**’ is a significantly stronger platform and positioning message than ‘**HELPS YOU LIVE LONGER**’. And notice that is it NOT related to the core function of a vitamin!

3.4 Differentiated from the Competition

The **THIRD** of the 4 critical elements that comprise a winning Positioning Matrix™ is that the ‘Meaningful Benefit’ promised must be clearly and distinctly **DIFFERENTIATED** from the competition. And the competition can be what they are using NOW or other products vying for their attention. Competition comes in many forms (5 different flavors actually, which are the subject of another paper). To craft a truly winning Positioning Platform, you must consider the competitive impact of ALL types.

Differentiation is almost ALWAYS A FAILURE if it attempts to show that your brand, product or service is the ‘better mousetrap’... cleaner, whiter, brighter, cheaper, etc... these are all ‘ME TOO, BUT BETTER’ approaches, and they almost always fail.

Re-read the story of how **Scope®** differentiated itself from market leader Listerine®: not by anything that had to do with the CORE FUNCTION of a mouthwash, but by comparing the way it tasted – **DE-POSITIONING** the horrible taste of Listerine – and actually creating an entirely new and disruptive category – what we call a new ‘**Category Class**’.

Where there WAS the category of ‘mouthwash’, Scope created the Category Class of ‘good tasting mouthwash’, and thus became the category leader.

Re-read the story of how **Apple Computers®** differentiated themselves from market leader IBM PC: not by anything that had to do with the CORE FUNCTION of a personal computer, but by comparing its portability, convenience and consumer friendliness – **DE-POSITIONING** the IBM PC’s clunkiness – by creating a **new and disruptive Category Class**.

Where there WAS the category of ‘personal computer’, Apple created the Category Class of ‘portable personal computer’, and thus became the category leader.

It is important to note that the choice of differentiation is highly related to the single most important element: **DE-POSITIONING** the competition.

3.5 De-Positioning the Competition

DEPOSITIONING THE COMPETITION, the **FOURTH** element, is the most difficult but the most powerful element of positioning. It means pre-empting the consumer from thinking positively about the competition, or what they are currently using.

There are only TWO proven ways to do this:

▶ **CREATE DOUBT** that the competition does, or has what the consumer REALLY wants, or...

▶ **CREATE DISSATISFACTION** in the consumers' mind that the competition does it well, or well enough.

Creation of doubt and dissatisfaction opens the consumers' mind to trying something new, which assuming your product DOES what it is supposed to do, and meets the expectations set in your brand positioning and messaging, leads to continuous use and advocacy (good reviews, telling friends, social proof, recommending, etc.), which in turn is what generates incremental and sustainable revenue growth.

De-positioning is the BIG home run in marketing, and especially important in the pre-launch, launch and immediate post-launch support periods, but it must be sustained consistently to support your overall brand positioning.

De-positioning is achieved when you pre-empt the consumers' consideration of the competition or motivate them strongly enough to make a switch.

3.6 The Positioning Matrix™ – Grid Showing The 4 Essential Elements Only

The Positioning Matrix™ is presented here as a sample grid, showing (at this point) ONLY the axis of the **FOUR ESSENTIAL ELEMENTS**:

Promises Meaningful Benefit				
Provable and Easily Evident				
Differentiated from Competition				
De-Positions Competition				

3.7 Weighting the Four Elements

We will see now that each of the FOUR Essential Elements does NOT have the same relative importance. This is dictated by the marketing and competitive environment in which you brand trades.

4 THE POSITIONING MATRIX™: THE FOUR MARKETING ENVIRONMENTS

4.1 The Positioning Matrix™ – The 4 Marketing Environments

Crafting and populating The Positioning Matrix™ also takes into account the ‘Marketing Environment’ in which your brand is trading. There are FOUR different marketing environments that impact the way the 4 Essential Elements are eventually combined to enable the creation of a winning Positioning Platform.

These are shown across the top row in the table below.

	Introductory	Offensive	Defensive	Remedial
Promises Meaningful Benefit				
Provable and Easily Evident				
Differentiated from Competition				
De-Positions Competition				

Depending on which marketing environment your brand trades in (and many brands will cross over between two environments), we will see that the weighting of each of the FOUR ESSENTIAL ELEMENTS will vary and need to be customized for YOUR specific positioning and branding.

4.2 The INTRODUCTORY Environment

INTRODUCTORY environments are when you are introducing a NEW product or category for the **FIRST TIME**. NOT the 2019 Honda Civic, but the AUTOMOBILE. They occur when you are introducing something entirely new, **or an entirely new ‘Category Class’** (this is the key for you, as it was for Apple Computers and Scope, both of whom introduced NEW CATEGORY CLASSES as their brand positioning strategy).

An important note: Since almost every category you can think of today already exists, the **ONLY** way to *de facto* invent a new one is to create a unique and disruptive **Category Class**. Thus, almost every winning positioning **WILL** have some percentage of its emphasis impacted by the weighting of the 4 Essential Elements in the Introductory Marketing Environment.

4.3 The OFFENSIVE Environment

OFFENSIVE environments are when you are trying to take market share away from a competitor, or current product. This is the most common marketing environment, and it applies strongly to every brand looking to capture more market share, or take market share away from competitors.

We see that there can (and likely WILL be a mix or overlap between marketing environments, and thus the WEIGHTING of the 4 Essential Elements will vary according to the exact mix of marketing environments and the state of the competitive set your brand is working against.

4.4 The DEFENSIVE Environment

DEFENSIVE environments are when you are trying to protect your market share from being poached away by a competitor. This is a very common marketing environment, but only affects you when you have a significant user base of customers who are vulnerable to being poached.

You WILL have to be prepared for this, but do not have to implement it in the initial stages.

4.5 The REMEDIAL Environment

REMEDIAL environments are when you have a serious PR issue to resolve... like the discovery of cyanide in bottles of Tylenol®.

In 1982 (called the Tylenol Murders) 7 people in Chicago died from cyanide poisoning when someone tampered with Tylenol bottles to extort money from the manufacturer Johnson & Johnson.

When the news broke, the FDA issued an immediate urgent nationwide recall of all Tylenol products, in a abundance of caution. And even through it was shown to be a case of a local psycho tampering with a few bottles in a confined location, people stopped buying ALL Tylenol brand products all over the country.

Tylenol invoked a REMEDIAL positioning strategy by inventing the TAMPER-PROOF SEAL we all know today that protects the caps on almost every drug and OTC product in existence. This remedial positioning response literally saved their ass. It's always good to plan for remedial situations, but it's very hard to predict what they will be.

4.6 Balancing the ELEMENTS with the MARKETING ENVIRONMENTS

Since there are 4 Marketing Environments, and a wide range of 'hybrid' environments (such as introducing a new Category Class AND moving to take market share away from competitors), the table below sets out the base mathematics of the relative weighting (importance) of each of the 4 Essential Elements for each marketing environment.

You then adjust from there based on your brand's specific marketing challenges and brand objectives, current position in your category, and the competitive set you're working against.

The table shown below lays out both the 4 ESSENTIAL ELEMENTS and the 4 MARKETING ENVIRONMENTS and shows the RELATIVE WEIGHTING in terms of importance of each of the elements for each marketing environment.

	Introductory	Offensive	Defensive	Remedial
Promises Meaningful Benefit	20%	40%	20%	40%
Provable and Easily Evident	10%	10%	40%	30%
Differentiated from Competition	40%	20%	10%	10%
De-Positions Competition	30%	30%	30%	20%

4.7 Factors That Will Affect Specific Weighting

Individual formulas may (and will) vary based on the following factors:

- Urgency / Necessity – as opposed to Discretionary, Luxury or Impulse objectives
- Competitive Landscape – dominance of any one player; category disruption opportunities
- Lifecycle Curve
- Creation of a new competitively disruptive Category Class

Our specific percentage weightings and formula may well be adjusted as per brand-specific and competition-specific requirements, and to create and maintain barrier to entry and competitive advantage, but most importantly to DISRUPT THE BELIEF SET consumers have about your competition (or whatever they are using that you want them to change in favor of your product or service), and thus DE-POSITION the competition.

4.8 Living The Positioning

Positioning science, and the creation of a winning Positioning Platform ALWAYS succeeds, but ONLY if you engage it and live it across ALL messaging in ALL media and channels, in ALL formats, at ALL times: in all content, websites, in SEO, in ads, on social media... every message touch point must support your Positioning Platform strongly and consistently. It is tempting to use logos, brand slogans, tag-lines, and clever descriptors to portray what you stand for, and these can often be thought to be sufficient. **They are not. These are only support elements for POSITIONING.**

If EVERY element of your marketing – from lead generation through nurturing of prospects through selling your products or services – does not employ powerful DISRUPTIVE COMPETITIVE POSITIONING & DE-POSITIONING, you will waste your time, money and resources, and likely fail. And in this aspect of marketing, failure is completely preventable.

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