

FOR FINANCIAL ADVISORS

THE POSITIONING BLUEPRINT

The Three-Prompt *System*

Find the positioning you're too close to see.

The structured-thinking half of a real engagement, in about two hours.

WHY THIS EXISTS

You can fix everyone's positioning but your own.

It has a name. Solomon's Paradox: the finding that people reason clearly about other people's problems and badly about their own. Proximity is the enemy of perspective.

You see it constantly. A client lays out a messy situation and the answer is obvious to you in minutes. Turn the same clarity on your own firm and it disappears. It is not a skill problem and it is not an intelligence problem. You are simply too close, and you cannot generate distance from yourself by trying harder.

For decades, the fix was to hire someone from the outside. A strategist would interview you, study your market, sit with the evidence, and weeks later hand back the thing you couldn't see. It worked because it manufactured distance. That distance is the entire product.

This Blueprint does the same job a different way. Three structured prompts treat your own answers as third-party evidence. They pull your story out, shape it into candidates, and stress-test what is left until only what is true survives.

THE HONEST CLAIM

This is not a replacement for a \$50,000 consulting engagement. It is the structured-thinking component of one, made accessible. It will not interview your clients or size your market. It will give you the disciplined distance to see your own firm clearly, which is where most positioning actually breaks.

WHAT YOU ARE ABOUT TO DO

One pulls it out. One shapes it. One stress-tests it.

Three passes, run in order. The first is you, answering questions on paper. The next two are prompts you paste into AI. Each builds on the one before it, so the order is the method. Plan for about ninety minutes of focused work. This is a positioning session, not a two-minute trick.

<h2>O1</h2> <h3><i>Discovery</i></h3> <p>You answer a 20-question workbook plus three visual exercises. The raw material comes out. About 60 minutes, no AI.</p>	<h2>O2</h2> <h3><i>Synthesis</i></h3> <p>A prompt runs your answers through five positioning frameworks and returns five to seven candidate statements with evidence.</p>	<h2>O3</h2> <h3><i>Pressure Test</i></h3> <p>A prompt runs each candidate through six failure modes and kills what doesn't survive. One statement is left standing.</p>
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The next page shows exactly how to run them, step by step.

HOW TO RUN IT

Sit down once. Run it in order.

Block ninety minutes and do it in one sitting. The passes build on each other, so the sequence matters. It works exactly the same in Claude or ChatGPT. Paste the prompts as written.

01

Answer the workbook

Fill in all 20 Discovery questions in the editable workbook. Be honest, not polished. This is you, on your own. No AI yet. About 60 minutes.

YOUR FOUNDATION

02

Run the Synthesis prompt

Open a fresh chat in Claude or ChatGPT. Paste the Pass 02 prompt, then paste your completed workbook right beneath it. You get five to seven candidate statements back.

5 TO 7 CANDIDATES

03

Run the Pressure Test prompt

In the same chat, paste the Pass 03 prompt as your next message. It scores every candidate and kills the ones that do not survive.

ONE SURVIVES

✓

One statement, stress-tested

What is left is your position. Take it to your headline, your opener, and the filter for everything you publish.

THE WHOLE SYSTEM, PLAINLY

One foundation, two prompts. Pass 01 is just you, answering the questions. Passes 02 and 03 are the two prompts you paste into the AI, one after the other, in the same chat. That is all of it.

PASS 01 · DISCOVERY

Get the raw material out of your head.

Twenty questions across seven categories, plus three visual exercises. The questions are built to get past the answer you would give on a sales call and reach the one that is actually true. Each comes with a short example so you can see the depth that works. Roughly an hour of honest writing. What you put here is what the next two passes have to work with, so write the real thing, not the brochure.

THE SEVEN CATEGORIES

01 Origin & Motivation. The why under the work.

02 The Business Today. The honest snapshot.

03 The Client & ICP. The wedge.

04 The Process. How the work actually happens.

05 Competition & Differentiation. The moat.

06 The Vocabulary. Your actual language.

07 Aspiration & Self-Critique. The gap you already see.

THREE VISUAL EXERCISES

A drink. Taste level, occasion, price signal, and who is comfortable holding it.

A car. Aspirational identity. What the owner is telling the world about themselves.

A place. Atmosphere. The room a client feels they have walked into when they work with you.

These run as aesthetic checks in Pass 02. Does the tone of each candidate match the world you described?

WHY THIS MATTERS

Almost every positioning failure traces to one of two causes: the firm does not actually know who it is, or it does and refuses to say it. Discovery surfaces both. Answer in the editable workbook, then paste it into Pass 02.

CATEGORY 01 *Origin & Motivation*

The why under the work.

- 01** Why did you start this firm? Not the version you tell clients, the real one. What were you reacting to, or running from?
- E.G.** I watched my dad get sold products that paid the advisor and not him. I wanted someone in the room who was actually on the client's side.
-
- 02** What part of this work would you still do if it paid half as much? That is the signal under the noise.
- E.G.** The first planning meeting, when someone finally sees their whole picture on one page and exhales. I would do that for free.
-
- 03** What was the moment you realized you were better at this than the people around you?
- E.G.** A client's CPA and attorney were arguing in circles, and I was the one who reframed the actual question. The room went quiet.
-

CATEGORY 02 *The Business Today*

The honest snapshot.

- 04** Describe the business as it actually is right now in three sentences. Revenue, client count, what works and what doesn't. No aspiration.
- E.G.** About 60 households, fee-only, healthy referrals, zero marketing. I am the bottleneck on almost everything.
-
- 05** If a client left you tomorrow, what would the real reason be? Name the actual weakness, not the polite one.
- E.G.** Slow response time. I go deep on the plan, then disappear for two weeks, and they feel forgotten between meetings.
-
- 06** What work pays you the most, and what do you most want to be known for? Are they the same thing yet?
- E.G.** Insurance reviews pay the bills. I want to be known for equity-comp planning for tech employees. Not the same yet.
-

CATEGORY 03 *The Client & ICP*

The wedge.

- 07** Describe the single best client you have, the one you would clone. Their situation, and what you did that mattered.
- E.G.** Mid-career engineer at a pre-IPO startup with equity she didn't understand. I built a tax and sell plan before the lockup and saved her a six-figure mistake.
-
- 08** Who do you quietly turn away, or wish you could? Naming who you are not for is half of positioning.
- E.G.** Day-traders who want me to validate their stock picks. We are not a fit, and I stopped pretending otherwise.
-
- 09** What does your ideal client believe about money, or about advisors, that most people don't?
- E.G.** That speed beats perfect optimization. They would rather make a good decision this week than a flawless one in three months.
-

CATEGORY 04 *The Process*

How the work actually happens.

- I0** Walk through your first 90 days with a new client, step by step. Where do they first say 'nobody has ever done that'?
- E.G.** Day one I rebuild their whole balance sheet live on screen. Most have never seen everything in one place. That is the moment.
-
- I1** What part of your process do you do differently from how you were trained? That deviation is where your real method lives.
- E.G.** I was trained to open with a risk-tolerance questionnaire. I throw it out and start with their calendar and their fears.
-
- I2** What do you refuse to do that is standard in your industry? The refusal is often the position.
- E.G.** I will not sell a product I would not own myself, and I will not keep a client who talks over their spouse in meetings.
-

CATEGORY 05 *Competition & Differentiation*

The moat.

-
- I3 **When a prospect doesn't choose you, what do they choose instead? Doing nothing, a robo, their CPA, a friend who's good with money?**
E.G. Usually doing nothing, or a big-box firm with a name they recognize. Rarely another independent like me.
-
- I4 **What can you say about your work that a competitor down the street could not say without lying?**
E.G. I have personally been through an IPO and a layoff. I am not theorizing about equity comp. I have lived the windfall and the panic.
-
- I5 **What do you believe about this profession that would make a room of other advisors uncomfortable if you said it out loud?**
E.G. Most 'full financial plans' are 80-page binders nobody reads, built to justify a fee. I would rather hand someone three decisions.
-

CATEGORY 06 *The Vocabulary*

Your actual language.

-
- I6 **Write the exact phrases you use with clients that you would never put in a brochure, including the slightly unprofessional ones.**
E.G. 'Let's not light money on fire.' 'That is a you-decision, not a math decision.' 'What is your sleep-at-night number?'
-
- I7 **What words do other advisors use that make you cringe, that you would never say?**
E.G. 'Holistic.' 'Trusted partner.' 'Your financial journey.' If I hear myself reaching for them, I stop talking.
-

CATEGORY 07 *Aspiration & Self-Critique*

The gap you already see.

- 18 Where do you want this firm in three years, and what would have to be true about how you are known for that to happen?
- E.G.** Known as the equity-comp person for pre-IPO employees in my city. For that, I would have to say no to everyone else.
-
- 19 What is the gap you already see in your own positioning, the part that is fuzzy, borrowed, or trying to please everyone?
- E.G.** My site says I serve 'individuals and families,' which means nothing. I am hiding, because picking a lane feels like losing the others.
-
- 20 If you had to keep only the right 20% of your clients and release the rest, who would you keep, and what does that tell you?
- E.G.** I would keep the tech employees with equity. The rest I keep out of fear, not fit. That is the answer, isn't it?
-

ABOUT THE VISUAL EXERCISES

These three analogies are the most revealing part of Discovery, and the easiest to do lazily. The rule: it is never about the object. It is about what the object means. Saying your brand is "not a Lamborghini" tells no one anything until you say why. Because it shouts. Because it is bought to be seen. Because it values being noticed over being good. That "why" is the actual signal, and it is usually sharper than anything you wrote above.

Two habits make these work. Pick the "not" first, since the thing you reject tends to define you faster than the thing you choose. And describe the feeling, not the brand, because a client never meets your logo. They meet how you make them feel in the room. The three exercises are on the next page. Do them last, when your instincts are warm.

THIS, NOT THAT

What you are not is the fastest way to what you are.

O1 *If my brand were a drink, it would be _____, not _____.*

WHAT IT SURFACES Taste level, occasion, price signal, and who is comfortable holding it.

WORKED EXAMPLE Not a flashy energy drink. It is loud, synthetic, promises a jolt and leaves a crash. Closer to black coffee. Plain, daily, no garnish, the thing serious people actually run on. The contrast says: a habit, not a sugar high.

NOW YOU Write both, then say what each one signals. The 'not' carries as much meaning as the 'is.'

O2 *If my brand were a car, it would be _____, not _____.*

WHAT IT SURFACES Aspirational identity. What the owner is telling the world about themselves.

WORKED EXAMPLE Not a Lamborghini. It shouts, it is bought to be seen, it values attention over substance. Closer to an old Land Cruiser. Understated, over-built, the choice of someone who knows what they are doing and does not need you to notice. The point is never the car. It is that you would rather earn quiet respect than turned heads.

NOW YOU Pick the 'not' first. Then ask why you would reject it. What is it about that car that, if it were your brand, would feel wrong? That answer is your real position.

O3 *If my brand were a place, it would be _____, not _____.*

WHAT IT SURFACES Atmosphere. The room a client feels they have walked into when they work with you.

WORKED EXAMPLE Not a marble bank lobby. Cold, formal, built to make you feel small and grateful. Closer to a serious kitchen at prep time. Focused, a little intense, everyone knows their job, you are welcome but not the center of attention. It says: a working space, not a showroom.

NOW YOU Describe the feeling of each place, not the furniture. What does a client carry out the door?

PASS 02 · SYNTHESIS

Run the evidence through five frameworks.

This is where distance does its work. The prompt is instructed to treat you as a third party, to read your evidence rather than your self-image, and to run it through five positioning frameworks at once. It returns five to seven candidate statements, each tied to the exact answers that produced it.

01 **Onlyness Statement** MARTY NEUMEIER
"My firm is the only ___ that ___ for ___ who ___ in/at ___." Every slot forced to specifics.

02 **Competitive Alternatives** APRIL DUNFORD
What prospects actually weigh you against, and the unique value you deliver versus each.

03 **Mechanism of Value**
The real process or judgment you deploy that others can't. Not "we care more."

04 **Category Move**
Better than rivals, or a different category entirely? If different, name it and own it.

05 **Statement Form**
One declarative sentence under 15 words. A fact, not a claim. Falsifiable. No filler.

Every candidate comes back under fifteen words, sourced to your own answers, with an honest note on how it could fail. No winner is chosen yet. That is Pass 03's job.

THE SYNTHESIS PROMPT

Paste this, then paste your Discovery beneath it.

PASS 02 · SYNTHESIS

<role>

You are a positioning strategist trained in the methodologies of Marty Neumeier and April Dunford. You are specifically trained to overcome Solomon's Paradox, the cognitive bias where people reason poorly about their own situations. Treat the user as a third party. Look at their evidence, not at them.

</role>

<context>

The user has completed a 20-question Discovery workbook plus three visual analogies. They will paste it after this prompt. Your job is to synthesize their answers into candidate positioning statements grounded in their actual evidence.

</context>

<method>

Run their Discovery through five positioning frameworks:

FRAMEWORK 01. Onlyness Statement (Marty Neumeier)

"My firm is the only ___ that ___ for ___ who ___ in/at ___."

Force specificity in every slot.

FRAMEWORK 02. Competitive Alternatives (April Dunford)

What do prospects actually compare them to? (Doing nothing. Robo-advisors. Their accountant. A friend who's good with money.) What unique value do they deliver versus each alternative?

FRAMEWORK 03. Mechanism of Value

What specific process, framework, judgment, or capability does the user deploy that competitors don't or can't? Not "we care more." A real mechanism, drawn from their Discovery answers about process and aha moments.

FRAMEWORK 04. Category Move

Is the user better than competitors, or in a different category? If different, what is the new category, and what makes them obvious in it?

FRAMEWORK 05. Statement Form

For each candidate, produce a single declarative sentence under 15 words. Fact, not claim. Falsifiable. No banned words (help, partner, trusted, boutique, personalized, dedicated, comprehensive, holistic, tailored, customized, white-glove, concierge).

Cross-reference the visual analogies as aesthetic checks. Does each candidate's tone match what they said in the "This, Not That" exercises?

</method>

<output>

Five to seven candidate positioning statements. For each:

- The statement (under 15 words)
- Which framework produced it
- The specific evidence from their Discovery that supports it (cite question numbers and quote)
- Why this could fail (the honest critique)
- Aesthetic alignment check versus their visual analogies (1 to 5 scale, plus one sentence)

End with: which two candidates are strongest, and why. Do not pick a winner yet. That comes in Pass 03.

</output>

<self_check>

Before delivering, ask: am I writing about this firm, or about advisors in general? If anything in the output could be cut and pasted into another advisor's analysis without changing meaning, delete it. Only what is uniquely true of this firm based on their evidence survives.

Also check: have I used any of the banned words? If so, regenerate.

</self_check>

PASS 03 · PRESSURE TEST

Break every candidate before the market does.

Most positioning dies in public, slowly. This pass kills the weak candidates in private, fast. The prompt becomes the toughest reviewer in the room and runs each statement through six failure modes. Anything that fails three or more is dead. What survives is what you commit to.

<p>TEST 01</p> <p><i>Fact or Claim</i></p> <p>A fact is provable; a claim is assertable. "I run a hedged-equity book for surgeons" beats "I build wealth." Below 6 of 10 fails.</p>	<p>TEST 02</p> <p><i>The Other Advisor</i></p> <p>Could a competitor copy it and still be telling the truth? If yes, it is a category description, not yours.</p>
<p>TEST 03</p> <p><i>So What</i></p> <p>Read it aloud, then ask "so what?" If it needs more explanation to land, it is incomplete.</p>	<p>TEST 04</p> <p><i>Dinner Party</i></p> <p>Could a non-advisor friend explain it back in their own words? Industry jargon loses most of the room.</p>
<p>TEST 05</p> <p><i>Banned Words</i></p> <p>help, partner, trusted, boutique, personalized, dedicated, comprehensive, holistic, tailored, customized, white-glove, concierge. Replace or kill.</p>	<p>TEST 06</p> <p><i>Twelve-Month Durability</i></p> <p>Still true and differentiated a year out? Or riding a trend that will commoditize? Position for the persistent reality.</p>

THE PRESSURE TEST PROMPT

Paste this as the next message, in the same conversation.

PASS 03 · PRESSURE TEST

```
<role>
You are now the toughest possible reviewer. Your job is to break every candidate from the previous pass before
the user takes it to market. Do not soften failures to spare the user's feelings.
</role>

<context>
You have 5 to 7 candidate positioning statements from Pass 02. Run each one through six failure modes. Score
honestly. Recommend kills.
</context>

<method>
For each candidate, run these six tests:

TEST 01. FACT OR CLAIM
A fact is provable. A claim is assertable. "I help clients build wealth" is a claim. "I run a hedged-equity
portfolio for surgeons with concentrated stock positions" is a fact. Score 1 to 10. Below 6 fails.

TEST 02. THE OTHER ADVISOR
Could another advisor in their space copy this statement and still be telling the truth? If yes, it's not
theirs. It's a category description. Keep iterating until no one else can say it without lying.

TEST 03. SO WHAT
Read the statement aloud, then ask "so what?" Does it contain its own answer to "what does that mean for me as
a prospect?" If it needs further explanation, it's incomplete.

TEST 04. DINNER PARTY
Could a non-advisor friend understand the statement and explain it back in their own words? If it needs
industry vocabulary, it loses eighty percent of its audience.

TEST 05. BANNED WORDS
Does it contain: help, partner, trusted, boutique, personalized, dedicated, comprehensive, holistic, tailored,
customized, white-glove, concierge? If yes, replace or kill.

TEST 06. TWELVE-MONTH DURABILITY
Will this still be true and differentiated in twelve months? Or is it riding a trend that will commoditize?
Position for the persistent reality.
</method>

<output>
For each candidate, deliver:
- The original statement
- A score (1 to 10) on each of the six tests
- The honest verdict: "Ship it," "Iterate," or "Kill"
- For the top two surviving candidates, a single rewritten "final form" that addresses all six tests

End with your recommendation: of the surviving candidates, which one to commit to, and why.
</output>

<self_check>
You are not here to be encouraging. You are here to find what survives stress. If a candidate fails three or
more tests, it dies. Do not soften failures to spare the user's feelings.
</self_check>
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ONCE YOU HAVE THE WINNER

A statement is only as good as where you put it.

The surviving statement is not a tagline to frame on a wall. It is the spine the rest of your presence hangs on. Put it to work in four places first.

WHERE IT GOES

Your headline. The first line of your LinkedIn and your site, word for word.

Your opener. How you answer "so what do you do?" without reaching.

Your filter. A test for every piece of content: does this sharpen the statement, or blur it?

Your screen. A way to tell a good-fit client from a bad-fit one on the first call.

KEEP IT HONEST

Re-run Pass 03 on any new idea before you adopt it.

If the firm changes, the evidence changes. Redo Discovery once a year.

Resist softening it to be liked. The edge is the point.

A NOTE ON COMPLIANCE

A positioning statement describes who you serve and how you work. It is not investment advice or a performance claim. Keep return predictions, specific products, and client outcomes out of it, and route anything investment-adjacent through your firm's review before it goes public.

REFERENCE · THE DISCIPLINE

The four rules that decide what survives.

O1 *A fact, not a claim.*

Anyone can claim. Almost no one can state a fact that is also differentiating. "I build wealth" is a claim. "I run hedged-equity books for surgeons with concentrated stock" is a fact. Hunt for facts.

O2 *No one else can say it.*

If a competitor could copy your statement and still be telling the truth, it is not yours. It is a category. Iterate until only you can say it without lying.

O3 *Under fifteen words.*

Length is where conviction goes to hide. If you cannot say it in one sentence a stranger understands, you do not have it yet.

O4 *The banned words.*

help · partner · trusted · boutique · personalized · dedicated ·
comprehensive · holistic · tailored · customized · white-glove · concierge

Every advisor uses them, which is exactly why they signal nothing. If your statement leans on one, it is leaning on a crutch the whole field shares.

WHAT THIS IS BUILT ON

Real frameworks, properly credited.

The synthesis and pressure-test method is original. The frameworks it runs on are not, and they are cited so you can read the source work directly.

Marty Neumeier

The Brand Gap and Zag. The Onlyness Statement and the discipline of radical differentiation.

April Dunford

Obviously Awesome. Competitive alternatives, and positioning as deliberate context-setting.

Grossmann & Kross

Research on Solomon's Paradox and self-distancing. Why we reason more wisely about others than ourselves, and how distance restores judgment.

SAID PLAINLY

This is the kind of structured thinking that used to require \$50,000 and six weeks, made accessible. It is substantial, it is grounded in real methodology, and it is honest about what it is and what it is not.

THE POINT OF ALL OF IT

The reason a stranger should choose you is usually the thing you are too close to see. The work is getting that into one sentence, then bringing it to the people who need it.

Comment **POSITION** for the editable workbook, or find everything at keirdillon.com.