



# Positioning Your Professional Services Firm

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**A Strategic Exercise for B2B Professional Services Firms Looking to Grow Beyond Founder-Led Sales**

Before anything is built, the positioning has to work.  
Strategy is not a document. It is proof.

PART 1

# Positioning Foundation

Before a market position can be claimed, the foundation has to be clear. The answers below represent the raw material from which a competitive positioning strategy is built. If you can't confidently answer the below questions, you need to start here before moving on.

DIRECTION	YOUR ANSWER
<p><b>Who is your ideal client?</b></p> <p>Describe the specific type of buyer your firm is best built to serve. Consider industry, company size, growth stage, and the role of the person who typically hires you.</p>	
<p><b>What problem do you solve?</b></p> <p>Identify the core business problem your firm addresses. This should be stated in the buyer's language, not in your internal terminology.</p>	
<p><b>What are you competing against?</b></p> <p>List the alternatives your buyer is weighing. This includes direct competitors, adjacent categories, internal teams, and doing nothing.</p>	
<p><b>What makes you a better option?</b></p> <p>Describe the specific capabilities, expertise, or structural advantages that make your firm the stronger choice. Avoid generic claims. Focus on what can be demonstrated.</p>	
<p><b>Why does your ideal client care about that advantage?</b></p> <p>Connect your differentiator to a business outcome your buyer is actively trying to achieve. Positioning that does not tie back to buyer motivation does not hold.</p>	

# Market Positioning Strategy

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With the foundation in place, the next decision is how to enter or reposition within the market. There are three primary strategies, and each carries different resource requirements, risk profiles, and timelines. The goal is to pick a position that can be won, not just occupied.



## STRATEGY A

### Head-to-Head

Competing directly against established market leaders on the same playing field. The same buyer, the same category, the same value proposition. This strategy requires a clear, demonstrable reason for the buyer to switch or choose differently. Without that, it becomes a resource war that favors the incumbent.



## STRATEGY B

### Niche Submarket

Carving out a defined segment of the broader market and serving it with a level of specialization that generalist competitors cannot match. The buyer exists within a larger category but has specific needs, dynamics, or buying behaviors that are being underserved. This is the “big fish, small pond” approach.



## STRATEGY C

### New Category Creation

Defining and owning an entirely new market category. The problem may already exist, but the solution is being framed in a way that does not fit neatly into any current competitive set. Category creators often become the default choice, but the timeline to market adoption is longer and the cost of category education is real.

## A Note on Sequencing

These strategies are not always permanent.

A firm may begin by establishing credibility in a niche submarket and later expand into a head-to-head position or a new category. The important thing is to choose a starting point where traction can be proven before resources are committed to scale.

Positioning that has not been validated with real buyers is a hypothesis, not a strategy.

# Your Positioning Strategy

## Which strategy fits your firm today?

Consider your current resources, market awareness and competitive landscape.  
Which position can be won from where the firm sits right now?

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## Where do you want to be in 3–5 years?

If the starting strategy differs from the long-term position, that is expected.  
Name the destination so the path can be sequenced.

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## What has to be proven first?

Before the positioning strategy is scaled, what evidence is needed to confirm that the market responds?  
This is the work that earns the right to invest further.

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# Strategy Comparison

Each positioning strategy carries a distinct set of advantages and trade-offs. The right choice depends on the firm's current stage, competitive reality, and available resources.

## Head-to-Head

Competing directly against market leaders for the same buyer.

### ADVANTAGES

- ✓ The market is already defined. Less time is spent on buyer education.
- ✓ Revenue potential is typically large. The total addressable market is established.
- ✓ Success is visible and measurable. Market share movement is a clear signal.
- ✓ Positioning can be validated quickly through direct buyer comparison.

### RISKS & TRADE-OFFS

- ✗ Incumbents have brand equity, budget, and buyer trust that takes years to build.
- ✗ Differentiation is harder to sustain. Competitors can copy messaging and features.
- ✗ Cost of acquisition tends to be higher. Buyers default to established names.
- ✗ Without a structural advantage, the position becomes a spending contest.

## Niche Submarket

Owning a defined segment with specialized expertise.

### ADVANTAGES

- ✓ Specialization creates natural credibility. Buyers trust firms that understand their context.
- ✓ Competition is reduced. Generalist firms cannot match depth of focus.
- ✓ Cross-client intelligence compounds over time, creating a defensible knowledge advantage.
- ✓ Marketing and sales efforts are more efficient because the ICP is clearly defined.

### RISKS & TRADE-OFFS

- ✗ Total addressable market is smaller by design. Revenue ceiling can become a constraint.
- ✗ The firm's identity is tied to the niche. Expanding later requires repositioning work.
- ✗ If the niche contracts or consolidates, vulnerability increases.
- ✗ Perception risk that niche equals small. Specialization value must be actively communicated.

## New Category Creation

Defining and owning an entirely new market category.

### ADVANTAGES

- ✓ Category creators often become the default option. First-mover advantage is significant.
- ✓ There is no direct competition at the outset. The firm sets the terms.
- ✓ Premium pricing is more achievable. There is no established price anchor.
- ✓ The narrative is fully owned. Positioning is not reactive to competitors.

### RISKS & TRADE-OFFS

- ✗ The market has to be educated before it can be sold. That requires sustained investment.
- ✗ Timeline to traction is longer. Revenue may lag behind effort significantly.
- ✗ If the category does not resonate, the investment is difficult to recover.
- ✗ Competitors can enter the category once established, often with more resources.

## What Comes Next

Completing this worksheet is the first step. Proving the positioning is the real work.

The **OTM Path to Growth**<sup>®</sup> begins with Prove the Strategy, where the positioning, ideal client profile, and messaging framework developed here are tested with real buyers through market response. Before anything is built, the message has to work. Strategy is not a document. It is proof.

If your firm has achieved traction and is ready to build the strategic foundation required for consistent, sustainable growth, a 30-minute consultation can identify where you sit in the **Professional Services Growth Lifecycle**<sup>™</sup> and what needs to happen next.



**Miles Kailburn**  
Founder/CEO, OTM

## Request Your Consultation Today

### About OTM<sup>®</sup>

OTM is a marketing consultancy that helps you define your strategy, align your team, and build a scalable growth engine that attracts, engages, and converts.

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