

HOW TO
guide.

Healthcare product *messaging playbook.*

YOUR WORKBOOK



**Great healthcare
innovations ~~don't~~ advance
healthcare if people ~~don't~~
*know about them.***

INTRODUCTION

Welcome to the Healthcare Product Messaging Playbook Workbook. This comprehensive guide will help you develop a strategic demand creation framework that ensures your healthcare product receives the recognition it deserves in the market.

WHY THIS MATTERS

In today's healthcare attention economy, products don't fail because they're ineffective - they fail because their value isn't effectively communicated to the right stakeholders. This workbook helps you break through the noise by creating messaging that resonates with decision-makers and influences purchasing behaviour.

This is not traditional marketing - it's strategic demand creation that aligns your product with the real challenges healthcare professionals face daily.

WHAT YOU'LL ACHIEVE

By the end of this process, you'll have a complete product messaging playbook that:

- Aligns your stakeholders around consistent, strategic messaging.
- Shifts focus from product features to customer problems and solutions.
- Establishes clear differentiation in the marketplace.
- Balances creative messaging with regulatory requirements (Compliant Creativity).
- Creates a foundation for all demand creation activities.
- Equips your sales team with messaging that resonates with C-suite priorities.

THE SAFE FRAMEWORK

Throughout this workbook, we'll apply the SAFE framework to ensure your messaging is:

- **Strategic:** Aligned with business objectives and market realities.
- **Aligned:** Consistent across all touchpoints and stakeholders.
- **Focused:** Targeting specific audience needs and challenges.
- **Efficient:** Designed for maximum impact with minimal resources.

HOW TO USE THIS WORKBOOK

- 1. Follow Along with the Modules:** Complete each section as we progress through the corresponding module in the course.
- 2. Be Specific and Detailed:** The more precise your inputs, the more valuable your playbook will be. Avoid generic statements - specificity drives results.
- 3. Embrace the Equip, Evolve, Empower Methodology:** Each exercise is designed to:
 - **Equip** you with strategic frameworks
 - **Evolve** your thinking from product-centric to customer-centric
 - **Empower** your team with messaging that drives demand
- 4. Involve Key Stakeholders:** While you may be leading this process, gather input from sales, product, and regulatory teams where appropriate.
- 5. Revise and Refine:** Your playbook is a living document that should evolve as you gain market insights.

Let's begin creating your strategic demand creation framework - one that transforms your healthcare product from being merely present in the market to becoming genuinely influential.

Where are *we now?*

This module helps you assess your current messaging, identify gaps and establish success criteria for your playbook.

Current Messaging Review

Select one of your current product messaging materials and analyse it:

Questions	Your Analysis
Who is the intended audience?	
What is the key message?	
Does it clearly articulate your product's value?	
Is it focused on customer problems or just product features?	
How consistent is this with other materials your team uses?	

Gap Analysis:

Based on your review and discussions, rank in order of importance the gaps which need to be addressed to enable improved effectiveness of your product messaging:

- Understanding of your audience.
- Understanding of customer problems.
- Product Positioning.
- Clarity/Consistency.
- Other (Specify).

Success Criteria

Based on your gap analysis briefly describe the current state and required improvements to be made in each area to be successful in achieving effective messaging:

Success Area	Current State	Required Improvements
Messaging Consistency		
Audience Targeting		
Problem-Solution Focus		
Market Differentiation		
Regulatory Compliance		
Sales-Marketing Alignment		

What is a *playbook*?

PLAYBOOK TYPES & RELATIONSHIPS:

Product Playbook vs. Sales Playbook vs. Brand Guidelines

Understand how your product playbook fits with other communication tools:

Aspect	Product Playbook (What you're creating)	Sales Playbook	Brand Guidelines
Primary Purpose			
Main Audience			
Content Focus			
Relationship to Your Product Playbook			

Core Playbook Structure Mapping

Identify the importance of each playbook section for your specific product and situation:

Playbook Section	Importance (Low/Medium/High)	Key Priorities for This Section
Audience Segmentation		
Customer Problem Mapping		
Positioning		
Value Proposition		
Features & Benefits		
Legal & Compliance		
Messaging Adaptation		
Implementation & Evolution		

03

MODULE

Moving to *problem solving*.

This module helps you develop audience-driven messaging that connects to real customer problems.

AUDIENCE SEGMENTATION:

Healthcare Stakeholder Mapping

Identify the 3-5 most important stakeholders for your product:

For Stakeholder Persona 1:
Role/Title:
Department/Function:
Influence Level on Purchase Decision (1-10):
Key Responsibilities:

For Stakeholder Persona 1:
Primary Pain Points:
What Success Looks Like to Them:
Information Sources They Trust:
How They Evaluate Solutions:

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AUDIENCE SEGMENTATION:

Healthcare Stakeholder Mapping

Identify the 3-5 most important stakeholders for your product:

For Stakeholder Persona 2:
Role/Title:
Department/Function:
Influence Level on Purchase Decision (1-10):
Key Responsibilities:

For Stakeholder Persona 2:
Primary Pain Points:
What Success Looks Like to Them:
Information Sources They Trust:
How They Evaluate Solutions:

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AUDIENCE SEGMENTATION:

Healthcare Stakeholder Mapping

Identify the 3-5 most important stakeholders for your product:

For Stakeholder Persona 3:
Role/Title:
Department/Function:
Influence Level on Purchase Decision (1-10):
Key Responsibilities:

For Stakeholder Persona 3:

Primary Pain Points:

What Success Looks Like to Them:

Information Sources They Trust:

How They Evaluate Solutions:

(Add more stakeholders as needed).

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IDEAL CUSTOMER PROFILE (ICP):

Define your ideal customer organisation:

Ideal ICP:
Organisation Type/Specialty:
Size (beds, physicians, patients, etc.):
Geographic Location(s):

Ideal ICP:
Technology Adoption Profile:
Budgeting Process:
Key Performance Indicators:
Current Alternative Solution:
Decision-Making Structure:

03

MODULE

Moving to *problem solving*.

CUSTOMER PROBLEM MAPPING:

Problem-Solution Matrix

For each key stakeholder, map their top problems to your solutions:

STAKEHOLDER PERSONA 1:

Problem	Current Approach	Limitation	Your Solution	Specific Impact/Outcome

STAKEHOLDER PERSONA 2:

Problem	Current Approach	Limitation	Your Solution	Specific Impact/Outcome

STAKEHOLDER PERSONA 3:

Problem	Current Approach	Limitation	Your Solution	Specific Impact/Outcome

IDEAL CUSTOMER PROFILE:

Problem	Current Approach	Limitation	Your Solution	Specific Impact/Outcome

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MODULE

Moving to *problem solving*.

VALUE PROPOSITION BY STAKEHOLDER:

Value propositions must be tailored to each stakeholder's specific priorities:

For Stakeholder 1:
Primary concern:
Value proposition:
Supporting evidence:
Objection anticipation:

'We help **X** do **Y** by doing **Z**'.

For Stakeholder 2:
Primary concern:
Value proposition:
Supporting evidence:
Objection anticipation:

For Stakeholder 3:
Primary concern:
Value proposition:
Supporting evidence:
Objection anticipation:

03

MODULE

Moving to *problem solving*.

FEATURES-TO-BENEFITS MAPPING:

Connect product features to specific stakeholder benefits:

Feature	Technical Description	Benefit to Stakeholder 1	Benefit to Stakeholder 2	Benefit to Stakeholder 3

Feature	Technical Description	Benefit to Stakeholder 1	Benefit to Stakeholder 2	Benefit to Stakeholder 3

04 & 05 MODULES Foundation & *claims validation.*

These modules ensure your messaging is not only compelling but also compliant and evidence-based.

REGULATORY FRAMEWORKS:

Relevant Regulatory Considerations

Identify the key regulatory frameworks that impact your product messaging:

Regulatory Body/Framework	Key Requirements	Impact on Messaging

CLAIMS MATRIX:

Evidence-Based Claims Documentation

The Claims Matrix is your foundation for compliant creativity - allowing you to be bold and impactful while remaining within regulatory boundaries.

Document your key claims and their supporting evidence:

Claim Statement	Supporting Evidence	Evidence Type/Strength	Regulatory Approval Status	Risk Level (Low/Med/High)	Allowable Variations	Usage Restrictions

04 & 05

MODULES **Foundation & *claims validation.***

Evidence Type/Strength Guidance:

- **Platinum Standard:** Randomised controlled trials, peer-reviewed publications.
- **Gold Standard:** Well-designed observational studies, case-controlled studies.
- **Silver Standard:** Case series, validated survey data.
- **Bronze Standard:** Expert opinion, theoretical models.
- **Preliminary:** Internal data, case studies (use with caution).

Remember: Strong claims require strong evidence. When evidence is limited, focus on the specific context where your claim applies rather than making broader generalisations.

Compliant Creativity Exercise

This exercise demonstrates how regulatory constraints can actually enhance your messaging rather than limit it. Compliant creativity isn't about watering down your claims - it's about making them more precise, credible, and impactful.

Transform these non-compliant claims into compliant alternatives that maintain or even enhance persuasive impact:

Non-Compliant Claim	Issue	Compliant Alternative	Supporting Evidence Needed
"Best-in-class performance"	Unsubstantiated superiority claim		
"Works better than competitors"	Unsubstantiated comparative claim		
"Guaranteed results"	Absolute claim without evidence		
"Eliminates all risks"	Overpromising without evidence		
"100% user satisfaction"	Statistical impossibility		
"Will increase your ROI"	Unqualified financial claim		

PRO TIP:

The most compelling claims aren't vague superlatives - they're specific, measurable statements that address what your audience truly cares about. A precise 23% reduction in a specific metric is far more persuasive than "best-in-class."

Go-to-market strategy & messaging matrix.

POSITIONING:

Strategic Differentiation Analysis

Before drafting your positioning statement, analyse what truly sets you apart:

Aspect	Your Offering	Competitor 1	Competitor 2	Competitor 3	Your Unique Advantage
Core Technology					
Clinical Impact					
Workflow Integration					
Economic Value					
Implementation					
Support Model					

Positioning Statement

Now, distil your differentiation into a powerful positioning statement:

“Unlike (competitive alternative), (your product) is the only (product category) that (key differentiator), which (key benefit to customer).”

Your Positioning Statement:

Positioning Stress Test:

- Is it credible and supportable with evidence?
- Is it meaningful to the customer?
- Is it difficult for competitors to claim?
- Can your entire organisation understand and rally behind it?

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MODULE

Go-to-market strategy & messaging matrix.

This module helps you create a comprehensive messaging matrix that aligns each key message with specific stakeholders.

MESSAGING MATRIX DEVELOPMENT:

Core Messaging Architecture

The Messaging Matrix is your strategic blueprint - ensuring consistency while allowing for stakeholder-specific adaptation.

First, establish your central message platform:

Core Message/Positioning Statement:

[Insert your positioning statement here]

Foundational Messaging Pillars:

Pillar 01:
Key concept:
Supporting evidence:
Relevance to differentiation:

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Supporting evidence:
Relevance to differentiation:

Go-to-market strategy & messaging matrix.

Stakeholder-Specific Messaging Matrix

Now adapt your core message for each stakeholder while maintaining consistency:

Core Message/Positioning Statement:

[Insert your positioning statement here]

Message Component	Stakeholder 1: Clinical (Name/Role)	Stakeholder 2: Economic (Name/Role)	Stakeholder 3: Technical (Name/Role)
Primary Message (Must always communicate)			
Supporting Message 1			
Supporting Message 2			

Message Component	Stakeholder 1: Clinical (Name/Role)	Stakeholder 2: Economic (Name/Role)	Stakeholder 3: Technical (Name/Role)
Supporting Message 3			
Key Evidence Points			
Pain Points Addressed			
Success Metrics That Matter			
Tone & Language			
Messaging Do's			
Messaging Don'ts			
Objection Handling			

Message Hierarchy & Channel Adaptation

Prioritise messages and adapt them for different channels:

Key Message	Priority (Primary/Secondary/Tertiary)	Website Adaptation	Sales Presentation Adaptation	Scientific Communication Adaptation	Social Media Adaptation

07

MODULE

Productive storytelling & narrative development.

This module helps you transform your technical product information into compelling narratives that connect emotionally with stakeholders.

ORIGIN STORY DEVELOPMENT:

SPQR Framework for Product Origin

Situation: (Describe the pre-existing conditions in healthcare that set the stage).

Problem: (Explain the specific problem or inciting incident that created a need for change).

Question: (Frame the central question that needed to be answered).

Response: (Detail how your product was developed to address the problem).

“So What?”: (Explain the meaningful impact this creates for healthcare stakeholders).

VISION-DESIGN RATIONALE:

Long-Term Vision & Mission

Articulate your product’s broader healthcare impact:

Vision Statement: (A statement of the long-term healthcare impact your product aims to achieve).

Mission Statement: (A statement specifying the 3-5 key healthcare problems your product addresses).

Product Approach & Philosophy

Define your product’s approach to solving healthcare challenges:

Guiding Principle	How It’s Reflected in Product Design	Connection to Healthcare Standards	Competitive Differentiation

NARRATIVE ADAPTATION:

Channel-Specific Narratives

Adapt your complete narrative for different contexts:

Website Narrative: (30-second elevator pitch version).

Sales Presentation Narrative: (2-minute conversation starter).

Scientific Publication Narrative: (Technical but compelling explanation).

Implementation & Training Narrative: (Practical onboarding story).

Implementation *plan.*

PLAYBOOK ROLLOUT STRATEGY:

Stakeholder Communication Plan

Stakeholder Group	Key Messages	Communication Channel	Timing	Success Criteria
Sales Team				
Marketing Team				
Product Team				
Regulatory/Legal				
Leadership				

Playbook Measurement & Evolution

Success Metric	Current Baseline	30-Day Goal	90-Day Goal	Measurement Method	Owner

ACTION PLAN:

Immediate Next Steps (Next 7 Days).

Short-Term Actions (Next 30 Days).

Medium-Term Actions (Next 90 Days).

Playbook *quality assessment.*

Use this framework to evaluate the strategic strength of your completed playbook:

DEMAND CREATION EFFECTIVENESS ASSESSMENT:

Rate each aspect on a scale of 1-5 (1=Needs significant improvement, 5=Exceptional):

Strategic Foundation

- Clear differentiation from competitors
- Customer-centric rather than product-centric
- Addresses genuine market needs
- Aligns with C-suite priorities
- Demonstrates compelling ROI

Audience Alignment

- Stakeholder segmentation is specific and detailed
- Pain points are genuine and validated
- Value propositions connect directly to stakeholder priorities
- Messaging resonates with decision-makers
- Objections are anticipated and addressed

Compliant Creativity

- Claims are substantiated with appropriate evidence
- Messaging is both compliant and compelling
- Differentiation is maintained within regulatory boundaries
- Complex concepts are simplified without oversimplification
- Translates features into meaningful benefits

Strategic Narrative

- Tells a coherent, memorable story
- Creates emotional connection while maintaining credibility
- Integrates seamlessly across channels
- Shifts from “what it is” to “why it matters”
- Evokes desired action from audience

Implementation Readiness

- Actionable for sales and marketing teams
- Provides clear guidance without excessive complexity
- Adaptable for different contexts and situations
- Contains tools for measurement and optimisation
- Includes plan for evolution and updates

Total Score Out of 125



Interpretation:

100-125: Strategic demand creation leader.

75-99: Strong foundation with specific areas for enhancement.

50-74: Functional but requires significant strategic development.

Below 50: Fundamental restructuring recommended.

Workbook *completion checklist.*

Track your progress through the playbook development process:

- Completed Current State Assessment (Module 1)
- Defined Success Criteria (Module 1)
- Mapped Playbook Structure (Module 2)
- Created Audience Personas (Module 3)
- Mapped Customer Problems to Solutions (Module 3)
- Developed Strategic Differentiation Analysis (Module 3)
- Developed Positioning Statement (Module 3)
- Created Value Propositions by Stakeholder (Module 3)

- Mapped Features to Benefits (Module 3)
- Identified Regulatory Frameworks (Module 4/5)
- Developed Comprehensive Claims Matrix (Module 4/5)
- Completed Compliant Creativity Exercise (Module 4/5)
- Created Messaging Architecture (Module 6)
- Developed Stakeholder-Specific Messaging Matrix (Module 6)
- Created Channel Adaptation Strategy (Module 6)
- Developed Product Origin Story using CAPSTONE (Module 7)
- Articulated Vision and Mission (Module 7)
- Defined Product Approach & Philosophy (Module 7)
- Adapted Narrative for Different Channels (Module 7)
- Created Implementation Plan with Clear Next Steps

CONGRATULATIONS on developing your Healthcare Product Messaging Playbook! You've created a strategic demand creation framework that will help your product receive the recognition it deserves in the market.

AGENCY

CREATIVE • CONTENT • LEAD GEN



Michael Colling-Tuck
Founder/Lead

t: 0117 290 0044

m: 07507 014005

mct@agencybristol.com

