INBOUND

Teardown Live!
Does Their Story Suck – or Convert?!

Kate DiLeo

September 3rd and 4th, 2025

After this session you'll be able to:

- Learn the proven brand messaging methodology, rooted in buyer psychology, that drives stronger sales and marketing outcomes.
- Recognize pitfalls to avoid so that your brand creates the "you get me" moment your prospects need to convert.
- Understand how to shift key components of your brand message so it compels buyers to take the right action.
- **But wait! There's more!**

For only 3 easy payments of $19.95…

You too can see what the best brands are doing!

WOW!

Tell us more!

Jerky sold separately.

(R.I.P. Ron Popeil…)

P.S. They STILL sell this thing!

Image Source: Target.com

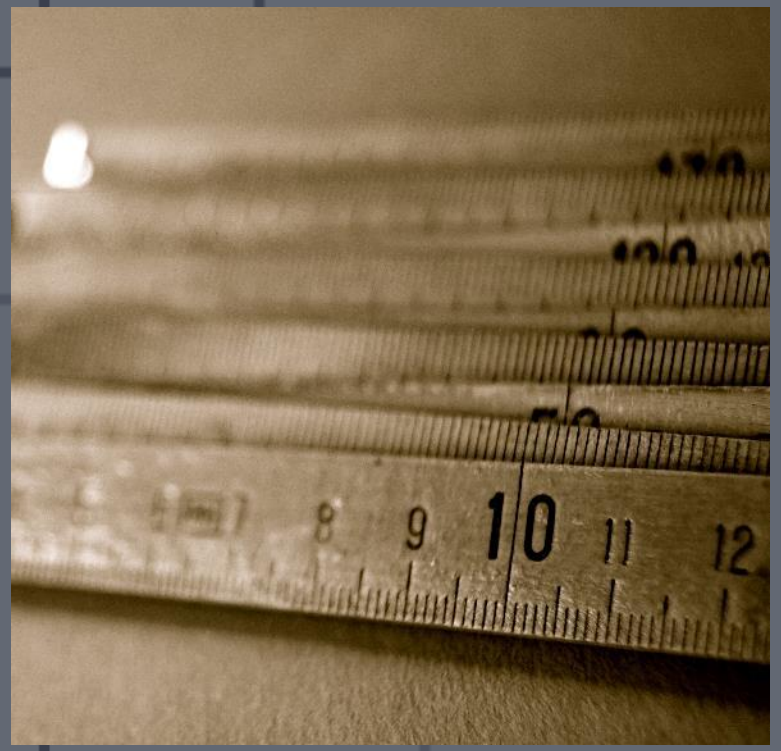
Why am I up here?

I'M KATE. BRAND ARCHITECT AND CMO.

- Background in linguistic anthropology
- Known for psychology-backed methodology
- Partnered with 350+ companies
- Fractional CMO for Series A B2B SaaS Brand
- Total brand nerd with a bad case of '90s nostalgia…
- Brand is the path of least resistance to **revenue**!

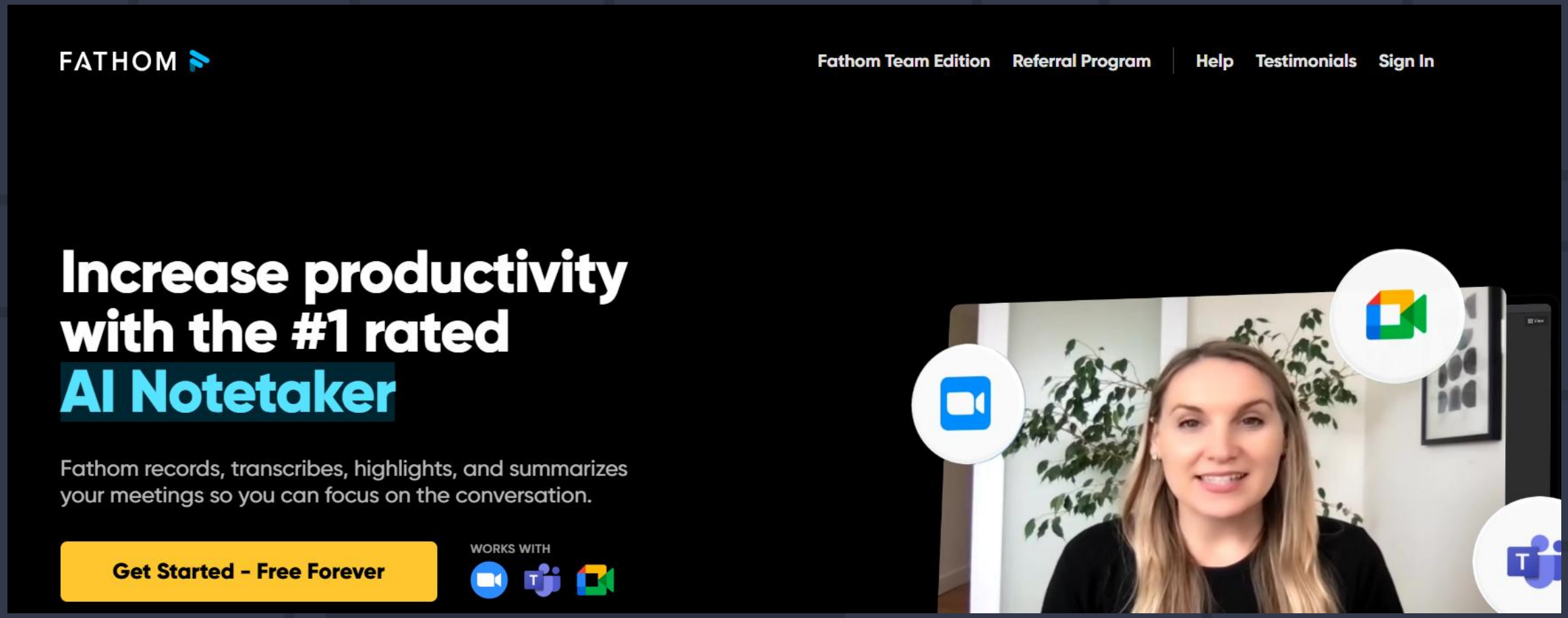
The rules of engagement:

GET EXCITED! THIS ISN'T YOUR TYPICAL TEARDOWN LIVE.



- What we **will** do:
  - *Be curious – consider why*
  - *Be constructive – consider how*
- What we will **not** do:
  - *Be negative Ned's or Nancy's*
  - *Bash a brand's integrity or offering*
- We will lift brands up, not just tear them down!

The sea of brand sameness



(I really like to be #1)

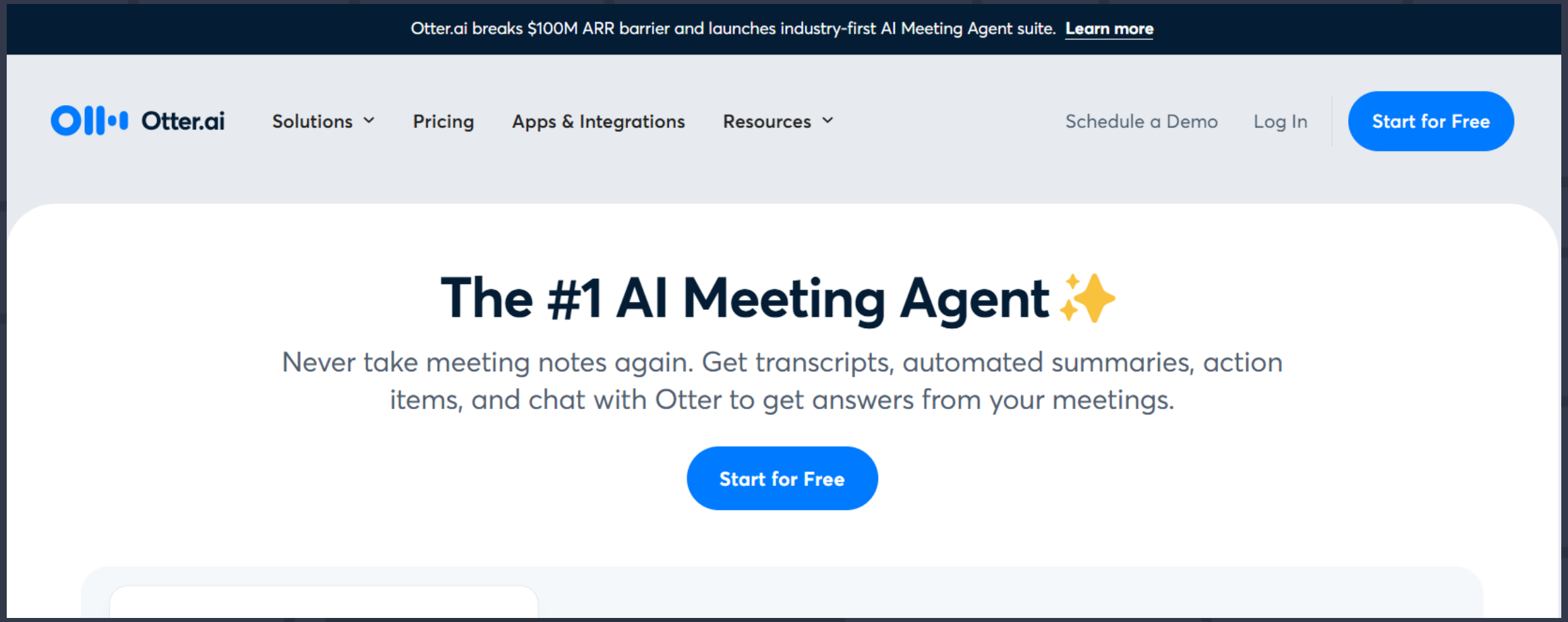
Source: https://www.fathom.video

Another one?

(Well, now I'm on a data hunt…)

Source: https://www.fireflies.ai

You have GOT to be kidding me…

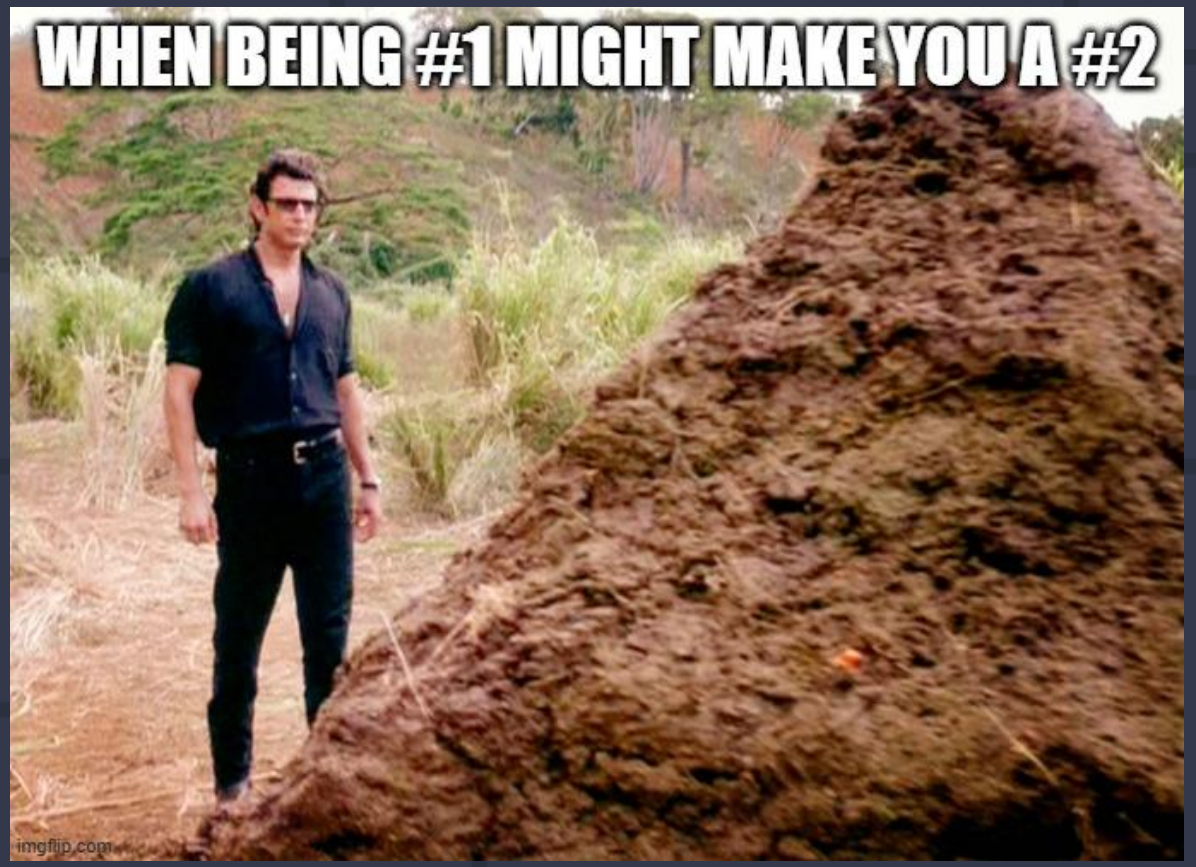


(I'm sticking to analog!)

Source: https://www.otter.ai

Speaking of #1

As my good friend Jay Schwedelson said…



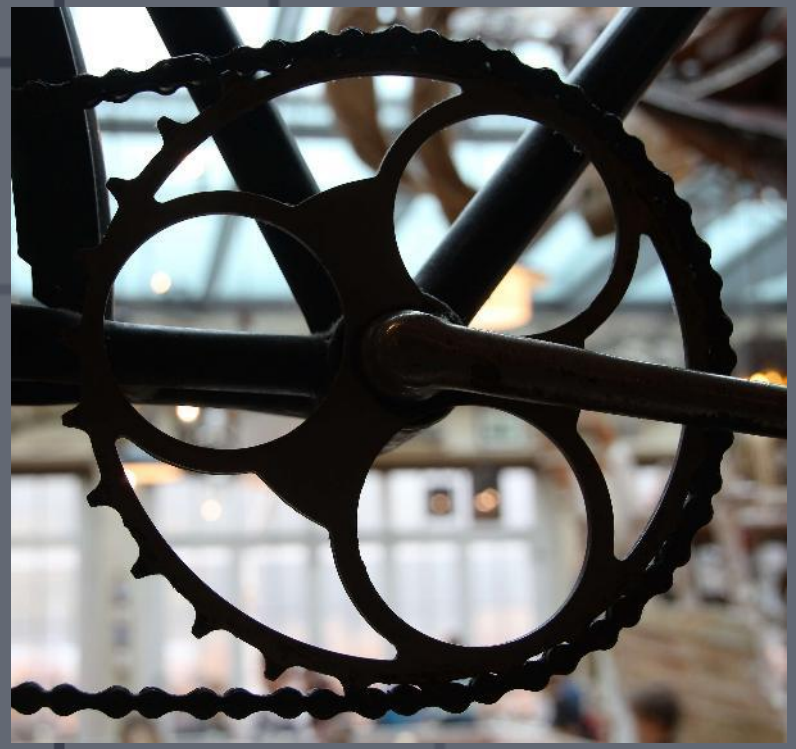
The state of the union for brands in 2025:

MARKETING, SALES, AND LEADERSHIP FEEL THE PAIN

- Lack of differentiation
- Immense pressure to perform
- Financial impacts:
  - Higher CAC
  - More competitive sales cycles
  - Lower pipeline and/or lost deal flow
  - Lower revenue

Get off the marketing hamster wheel:

BUILD A BRAND THAT IS THE PATH OF LEAST RESISTANCE TO REVENUE



- #1 way to differentiate your brand
  - *NOT a campaign*
  - *NOT thought leadership*
- Step 1 = brand message refinement
- Brand can create conversations that **convert**
- Requires a formulaic approach
  - *Rooted in buyer psychology*

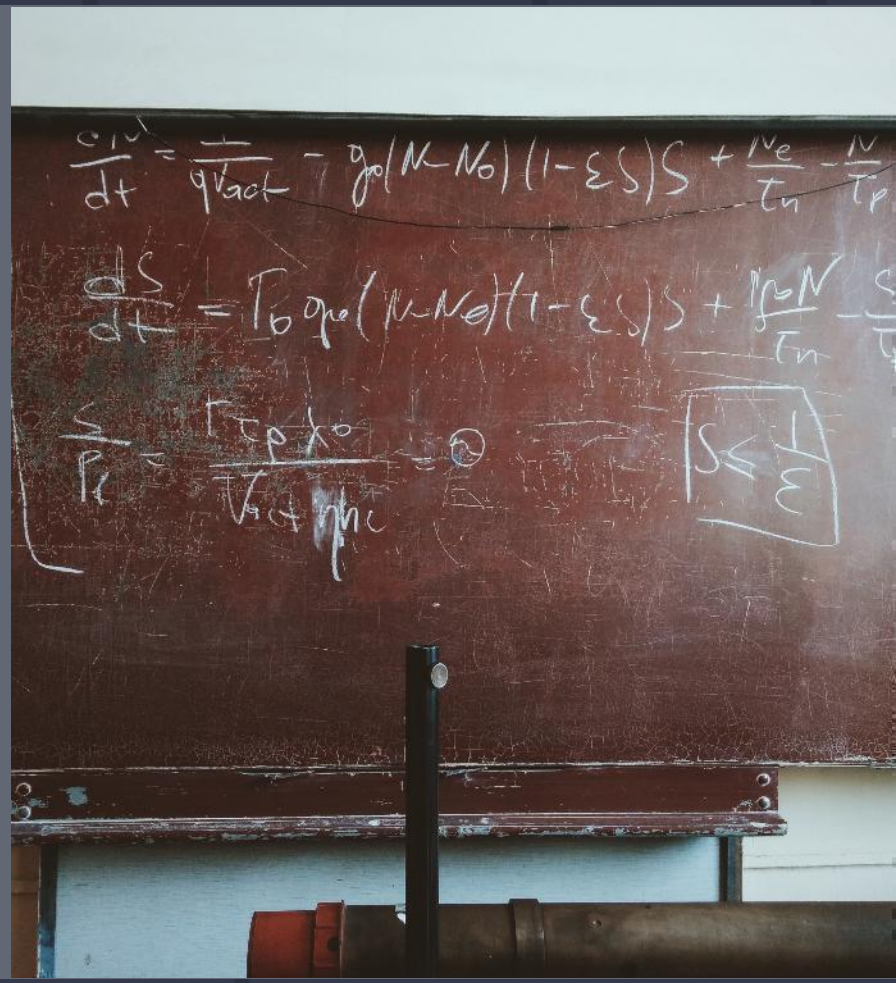
Buckle up. Here's the plan:

- **Step 1:** Review The Brand Trifecta® formula
- **Step 2:** Weigh two (2) brands against the method
- **Step 3:** Learn simple + powerful brand improvements
- **Step 4:** Check out other brands who are rocking it!
- **Step 5:** Figure out **your** next steps (QR code)

The Brand Trifecta®

A PROVEN AND FORMULAIC BRAND MESSAGING MODEL

- Tagline
  - *What you do*
- Value Proposition Statement
  - *How you solve your customer's problem*
- Differentiator Statements
  - *How you differ from the competition*
- A + B + C = conversion moment



The two big musts:

GREAT BRANDS FOLLOW THESE TWO KEY PRINCIPLES

- **#1 What and how you say it matters.**
  - *Word choice*
  - *Tone of voice*
  - *Grammar and punctuation*
- **#2 Order of operations matters.**
  - *Don’t break the order of The Brand Trifecta®*
  - *Storytelling comes **after** The Brand Trifecta®*

The Brand Trifecta®

1. TAGLINE

- 1st line of defense in your brand
- B2B brands: *what you do*
- B2C brands: *promise of the experience*
- Short and precise phrase
- Provocative, not pretentious
- Provokes a response from prospects…
  - *“Really? What do you mean by that?”*

The Brand Trifecta®

2. VALUE PROPOSITION STATEMENT

- Expounds on your Tagline
- Answers the initial question…
  - *“What do you mean by that?”*
- Says how you solve the heart pain
- Creates the “You get me!” moment
- Compels a **critical comparison moment**
  - *Imperative for prospects to convert*

The Brand Trifecta®

3. DIFFERENTIATOR STATEMENTS

- Says how you are better than the rest
- Max 3 – 5 bullet points
- Macro Level – not all features/benefits
- Speed, delivery model, proprietary approach, unique technology, level of service…
- Addresses the **critical comparison moment**
- Brings prospects to the point of conversion

The buyer psychology:

THE METHOD BEHIND THE BRAND TRIFECTA® "MADNESS"

- The "how/what" question signals conversion
- Until prospects hear The Brand Trifecta®…
  - *They are **not** ready to know the details!*
- Creates a natural content hierarchy
- Opens the door for story-based content
  - *Features/benefits, video, long-form content*
- **Prospects self-select into the buying process**

Rember these two?

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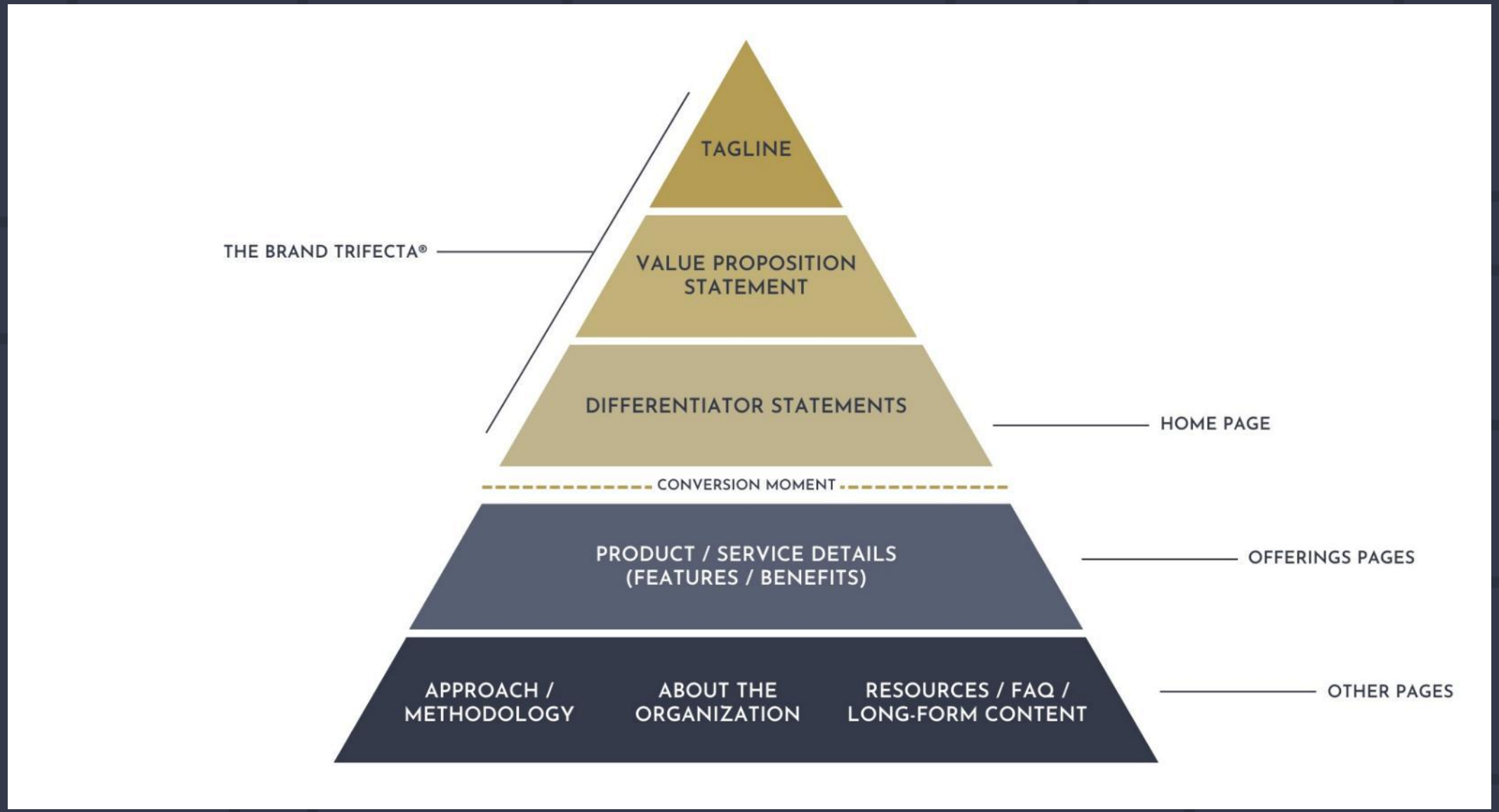
Order of operations



Buckle up.

How did I get two big brands to join in?

Calm down! I'm joking.

I didn't ask. I begged.

I promised to keep it kind and constructive.

They agreed!

(Who doesn't love a good fruit basket?)

Also, I still subscribe to the H&D catalog…

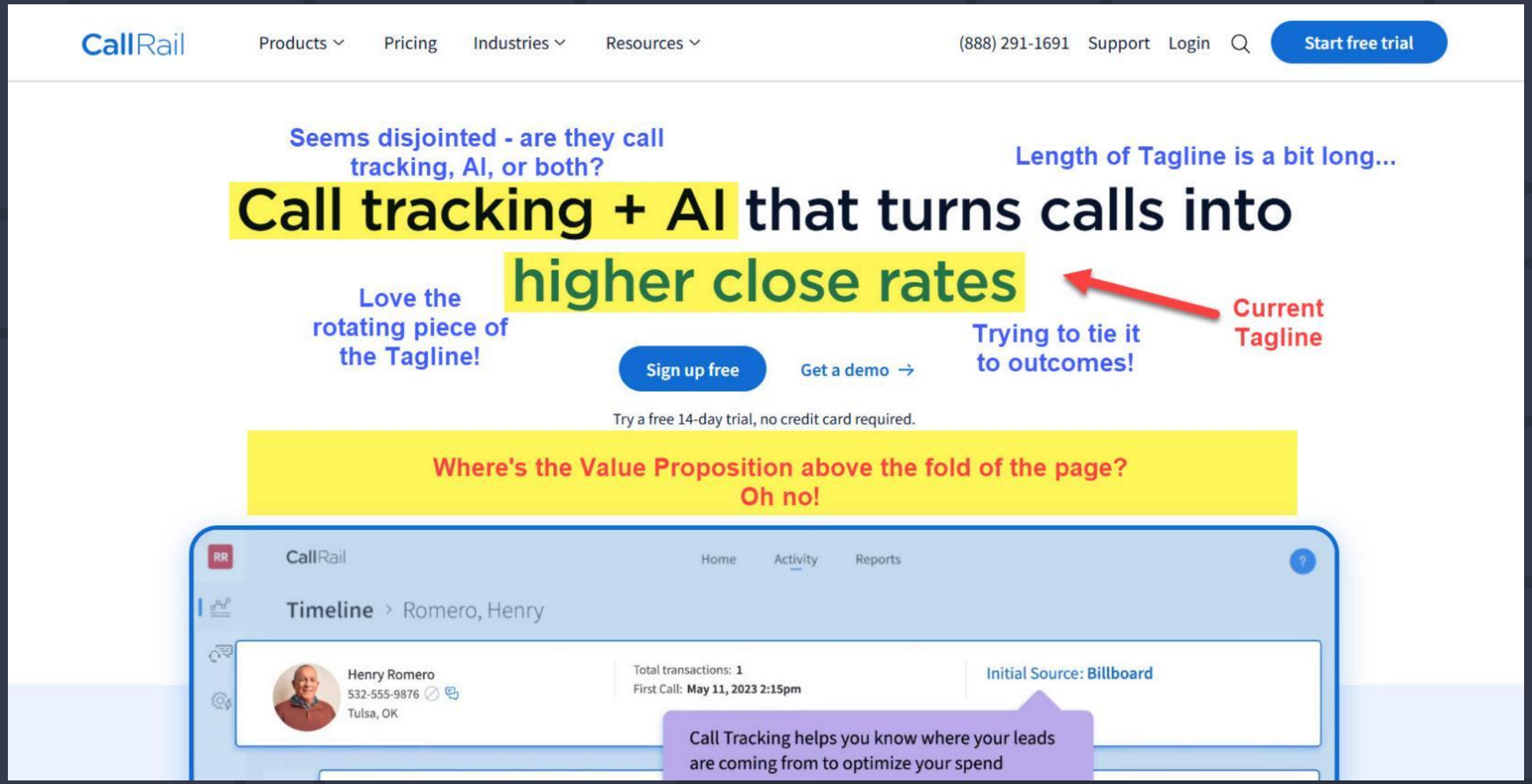
Source: https://harryanddavid.com

Brand #1: CallRail

WHAT'S GOING ON?

- Strong brand, product, and tone of voice
- Target audiences: SMBs and marketing agencies
- Shift from just call tracking to all-in-one platform
  - *Move from AI being a (+) to central to the brand*
  - *Product and message evolution…*
- So…how strong is their brand message?
  - *Weigh it against The Brand Trifecta®*

CallRail: Before



CallRail: Before

Strong, simple sentiment that is in line with the brand's tone of voice

Market with confidence

Current Value Proposition Statement

CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard.

Learn more →

Slightly pointing to the all-in-one platform concept but it's getting buried

Uh oh! We are missing Differentiators!

Product Positioning (Feature/Benefits)

Power of 3 not 30!

Optimize your campaign spend

Don't waste another penny on under-performing campaigns. See which channels generate more leads and maximize your ROI.

Deliver a personal touch, at scale

Tailor every lead's experience with personalized call routing, hold messaging, and other automations based on their campaign source.

Action-oriented language

Bring in more of your best leads

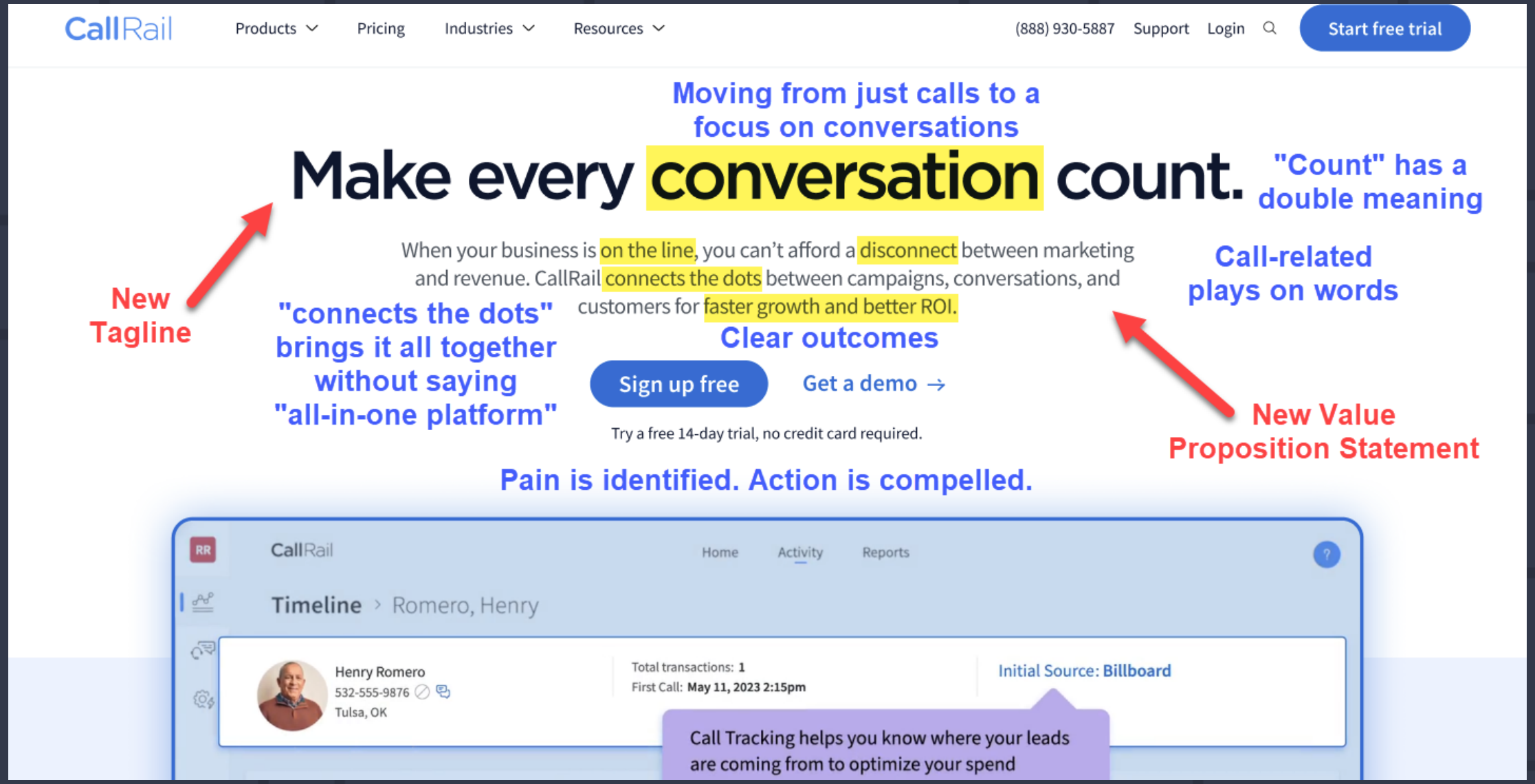
Illuminate the patterns and needs of your highest-value customers by tapping into automatic conversation analysis and lead scoring.

Consistent length and tone

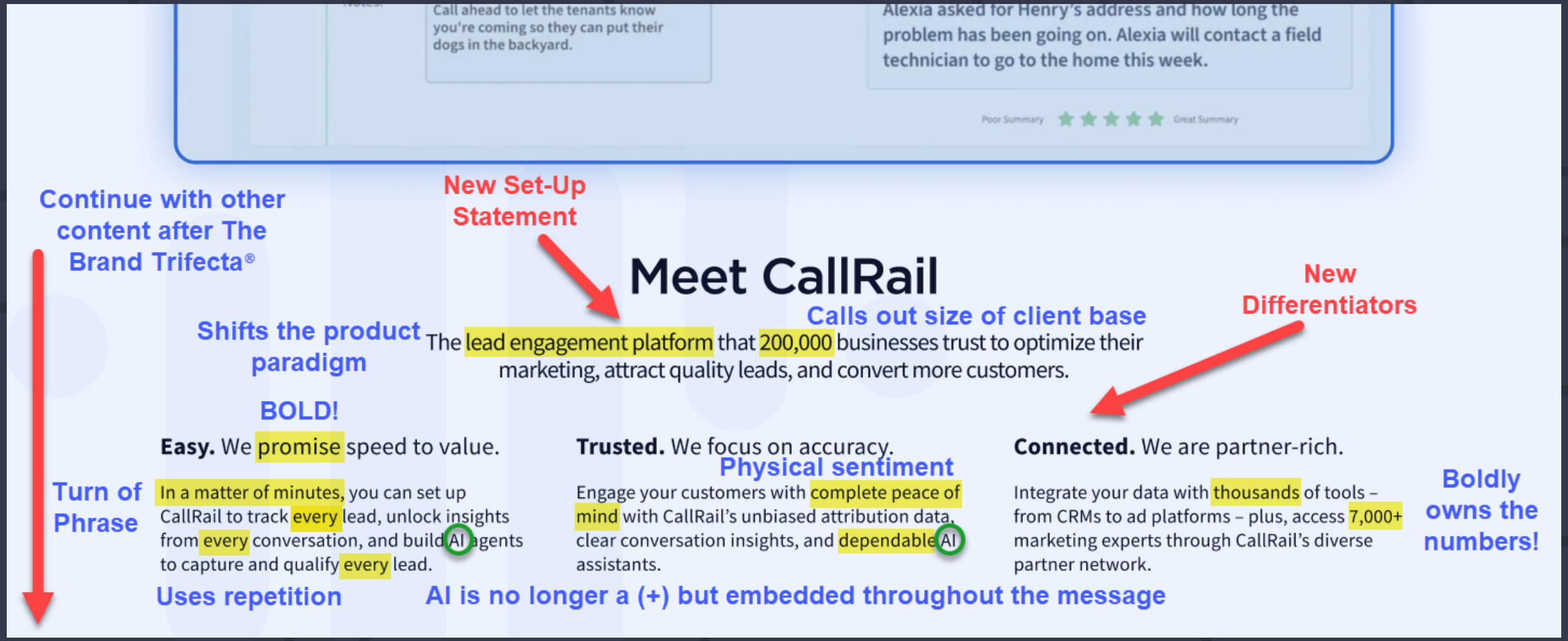
CallRail: Before

- **Tagline:** Call Tracking + AI that turns calls into…
  - *Campaigns that convert; more quality leads; cost savings; higher close rates; your competitive advantage*
- **Value Proposition Statement:** Market with Confidence. CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard.
- **Differentiator Statements: NONE**
- **Product Positioning (Feature/Benefits):**
  - **Optimize your campaign spend.** Don’t waste another penny on under-performing campaigns. See which channels generate more leads and maximize your ROI.
  - **Deliver a personal touch, at scale.** Tailor every lead’s experience with personalized call routing, hold messaging, and other automations based on their campaign source.
  - **Bring in more of your best leads.** Illuminate the patterns and needs of your highest-value customers by tapping into automatic conversation analysis and lead scoring.

CallRail: After



CallRail: After



CallRail: After

- **Tagline:** Make every conversation count.
- **Value Proposition Statement:** When your business is on the line, you can't afford a disconnect between marketing and revenue.

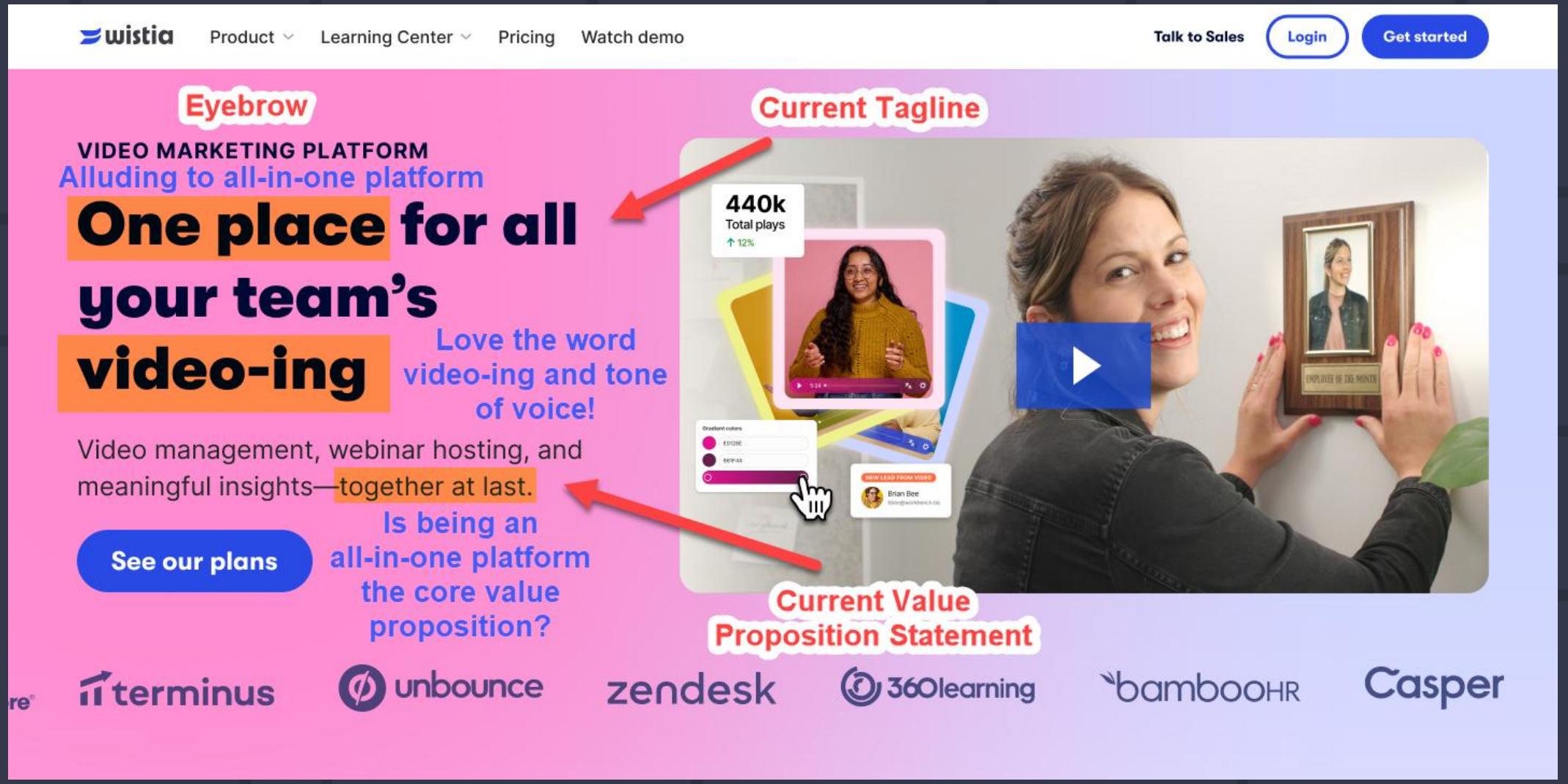
  CallRail connects the dots between campaigns, conversations, and customers for faster growth and better ROI.
- **Meet CallRail:** the lead engagement platform that 200,000 businesses trust to optimize their marketing, attract quality leads, and convert more customers.
- **Differentiator Statements:**
  - **Easy.** We promise speed to value. In a matter of minutes, you can set up CallRail to track every lead, unlock insights from every conversation, and build AI agents to capture and qualify every lead.
  - **Trusted.** We focus on accuracy. Engage your customers with complete peace of mind with CallRail's unbiased attribution data, clear conversation insights, and dependable AI assistants.
  - **Connected.** We are partner-rich. Integrate your data with thousands of tools–from CRMs to ad platforms–plus access 7,000+ marketing experts through CallRail's diverse partner network.

Brand #2: Wistia

WHAT'S GOING ON?

- Strong brand, product, and tone of voice
- Target audience: B2B SaaS Brands 50 – 1,000 EE's
- Shift from just video to the ultimate video platform
  - *New webinar offering – beat the competition*
  - *Product and message evolution…*
- So…how strong is their brand message?
  - *Weigh it against The Brand Trifecta®*

Wistia: Before



Wistia: Before

Uh Oh! We are missing Differentiators!

Excellent sentiment of pain! **Tired of tool overload?**

The collective "we"

We get it. That's why we made Wistia—a video platform that helps you do it all, from "action" to analytics.

Video language

Speaks again to all-in-one platform concept

Product Positioning (Features/Benefits)

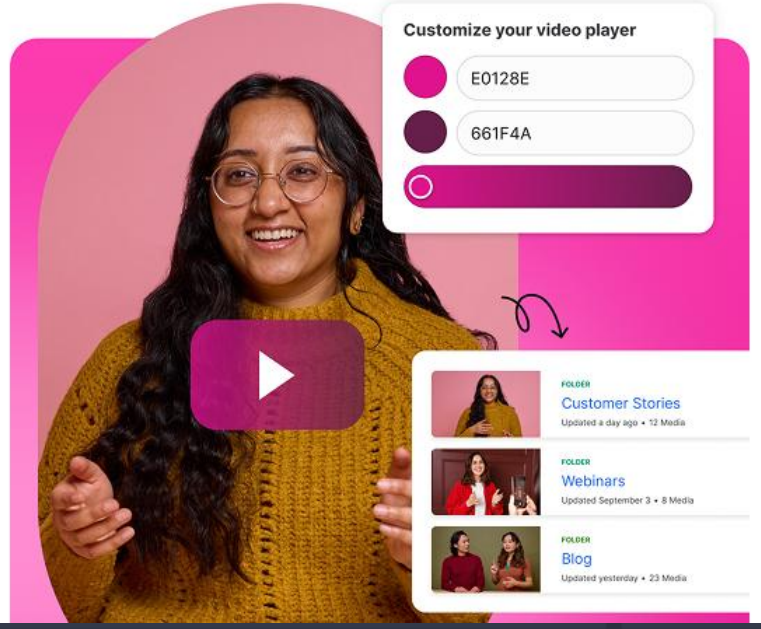
Video hosting & management

Consistent length and tone

Embed videos anywhere with our ad-free, customizable player. Plus, keep your video library organized with folders, filters, and tags.

Learn more →

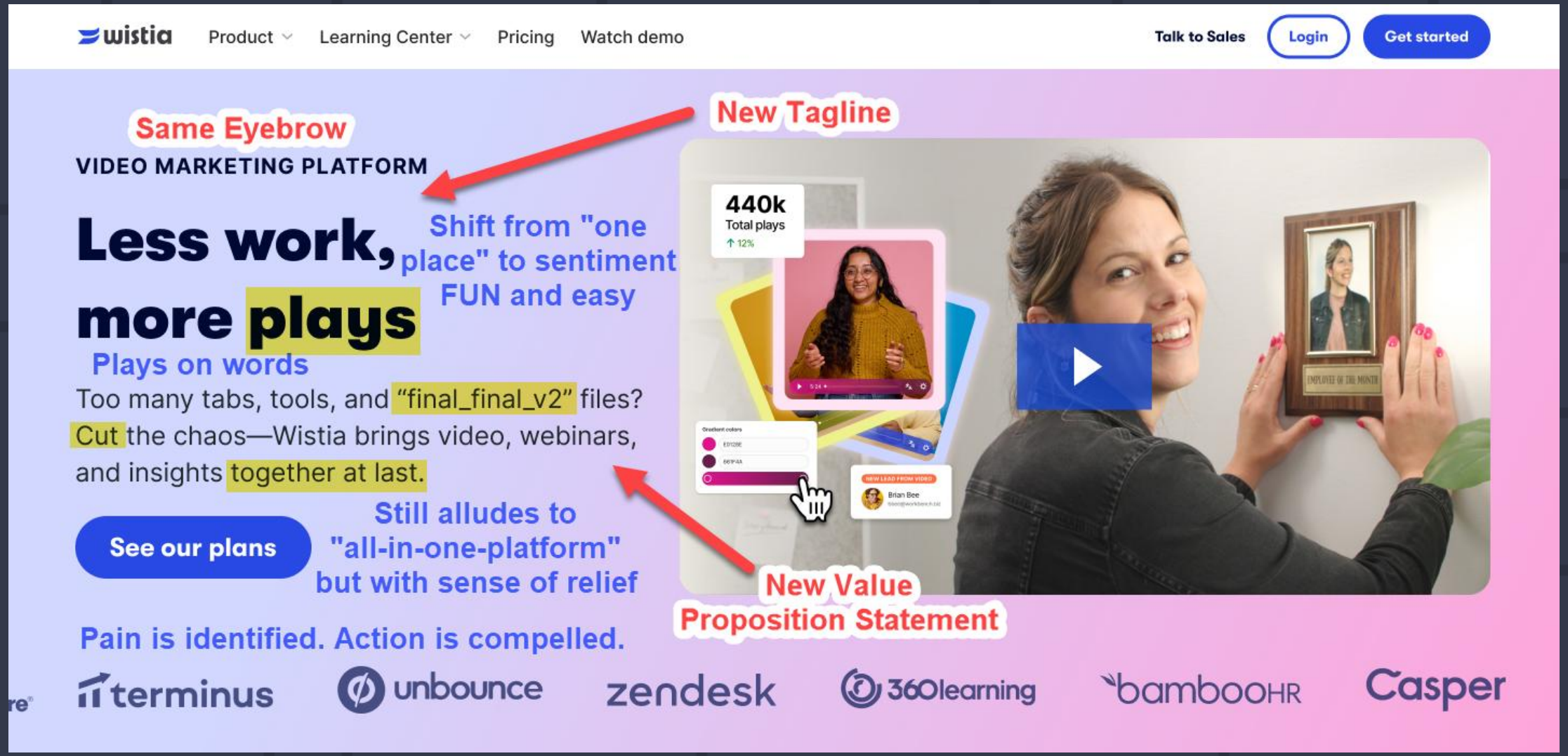
Action-oriented language



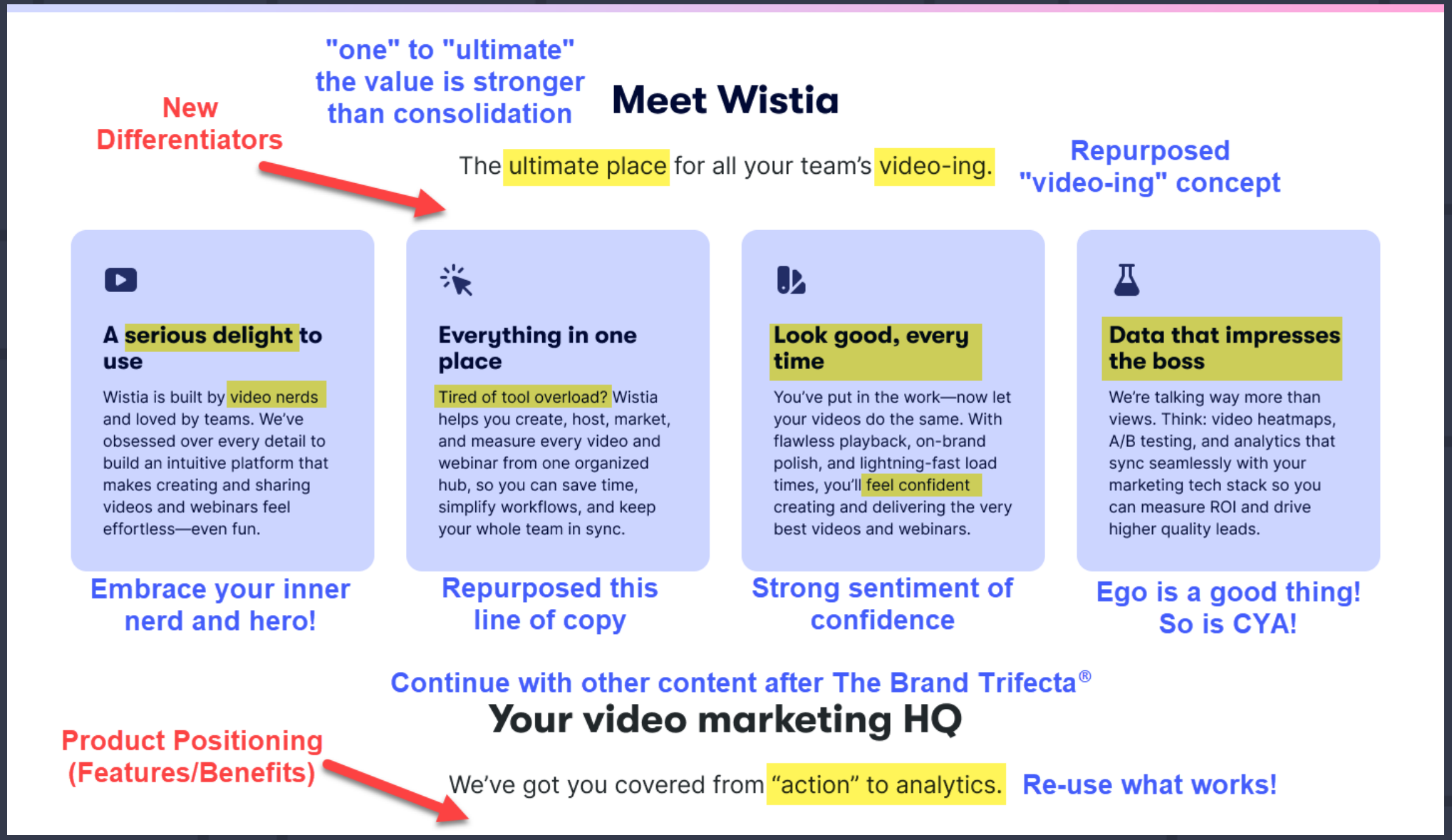
Wistia: Before

- **Tagline:** One place for all your team's video-ing
- **Value Proposition Statement:** Video management, webinar hosting, and meaningful insights—together at last.
- **Differentiator Statements: NONE**
- **Product Positioning (Feature/Benefits):** Tired of Tool Overload? We get it. That's why we made Wistia—a video platform that helps you do it all, from "action" to analytics.
  - **Video hosting & management.** Embed videos anywhere with our ad-free, customizable player. Plus, keep your video library organized with folders, filters, and tags.
  - **Webinars.** When you host a webinar with Wistia, you can customize the branding, connect to your marketing tools, and use your webinar recording as evergreen content.
  - **Recording & editing.** No studio needed. Just grab your laptop to start recording. Then, use our AI editing tools to polish up your content.
  - **Actionable insights.** See exactly how viewers engage with your content and instantly sync that data with your marketing tech stack.

Wistia: After



Wistia: After



Wistia: After

- **Tagline:** Less work, more plays
- **Value Proposition Statement:** Too many tabs, tools, and “final_final_v2” files? Cut the chaos – Wistia brings **v**ideo, webinars, and insights together at last.
- **Meet Wistia:** the ultimate place for all your team’s video-ing.
- **Differentiator Statements:**
  - **A serious delight to use.** Wistia is built by video nerds and loved by teams. We’ve obsessed over every detail to build an intuitive platform that makes creating and sharing videos and webinars feel effortless – even fun.
  - **Everything in one place.** Tired of tool overload? Wistia helps you create, host, market, and measure every video and webinar from one organized hub, so you can save time, simplify workflows, and keep your whole team in sync.
  - **Look good, every time.** You’ve put in the work, now let your videos do the same. With flawless playback, on-brand polish, and lightning-fast load times, you’ll feel confident creating and delivering the very best videos and webinars.
  - **Data that impresses the boss.** We’re talking way more than views. Think: heatmaps, A/B testing, and analytics that sync seamlessly with your marketing tech stack so you can measure ROI and drive higher quality leads.

The takeaways:

PRACTICAL YET POWERFUL BRAND SHIFTS YOU CAN MAKE

- Create the “you get me” moment
  - *Tagline + Value Proposition Statement*
- Focus on differentiation BEFORE product details
  - *Don’t miss the critical comparison moment*
- Don’t break The Brand Trifecta® formula
- Focus on order of operations for content

The takeaways, cont'd:

PRACTICAL YET POWERFUL BRAND SHIFTS YOU CAN MAKE

- Skip complex storytelling - NO paragraphs!
- Each line should draw you further in
  - *Whether reading it or hearing it*
- Own your tone of voice and personality
- Leverage language and concepts that are working
- Don't rip and replace. **Dial it in! Do the ¼ turn!**

And now we shall…

(Yes – that's renowned INBOUND speaker Jay Schwedelson.)

Brands that are rocking it:

P.S. I DO NOT KNOW ANY OF THESE BRANDS PERSONALLY

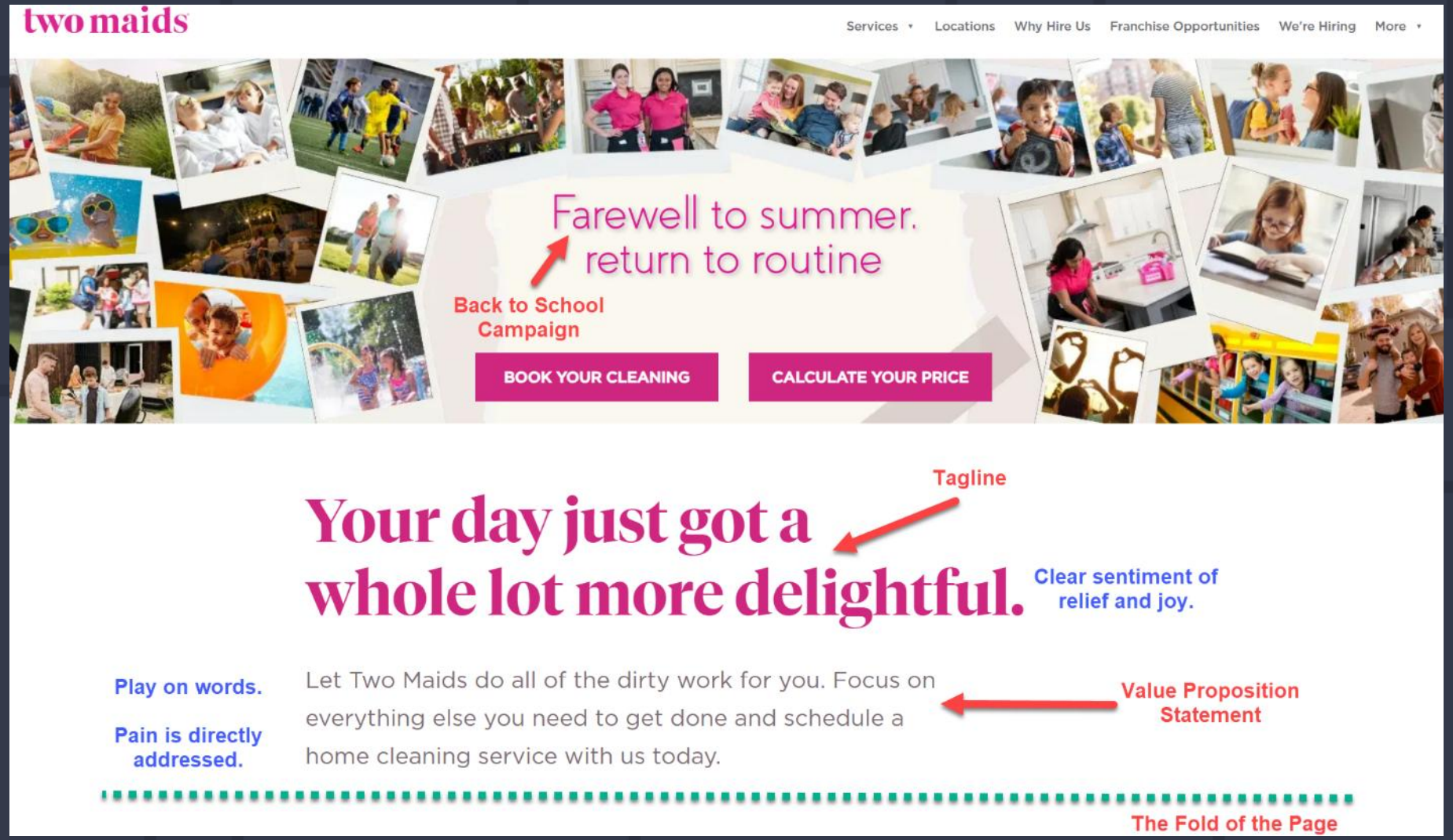
- Not my clients
- Not my friends – yet! ☺
- If you know anyone at these brands – tell me!
- Leverage The Brand Trifecta® without knowing it
- Have great offerings, followings, and loyalty
- Just a fan looking for some autographs

Let us now observe them in the wild…

(Please channel your best inner Sir David Attenborough…)

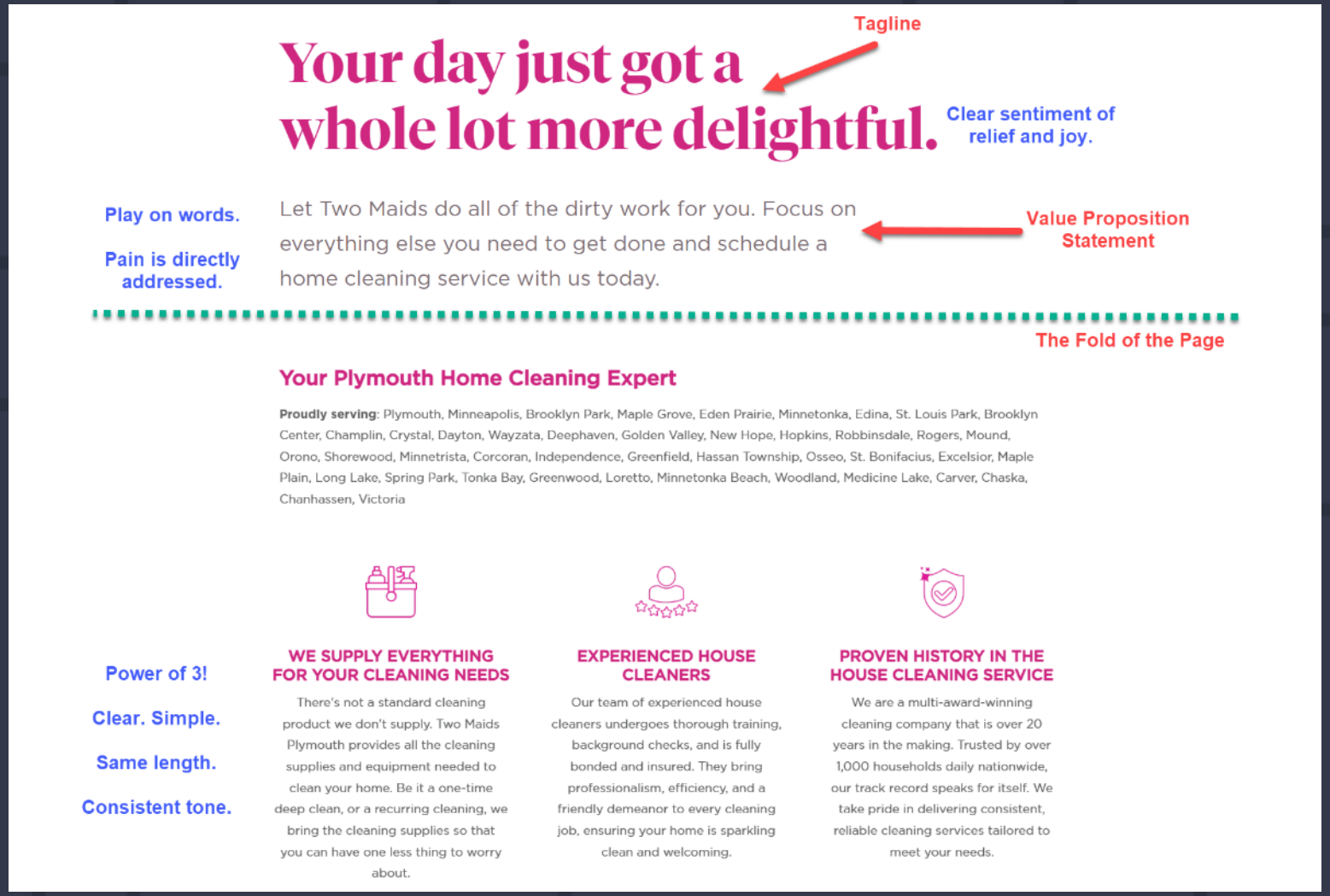
Source: Pexels.com

Fan brand #1: Two Maids Cleaning



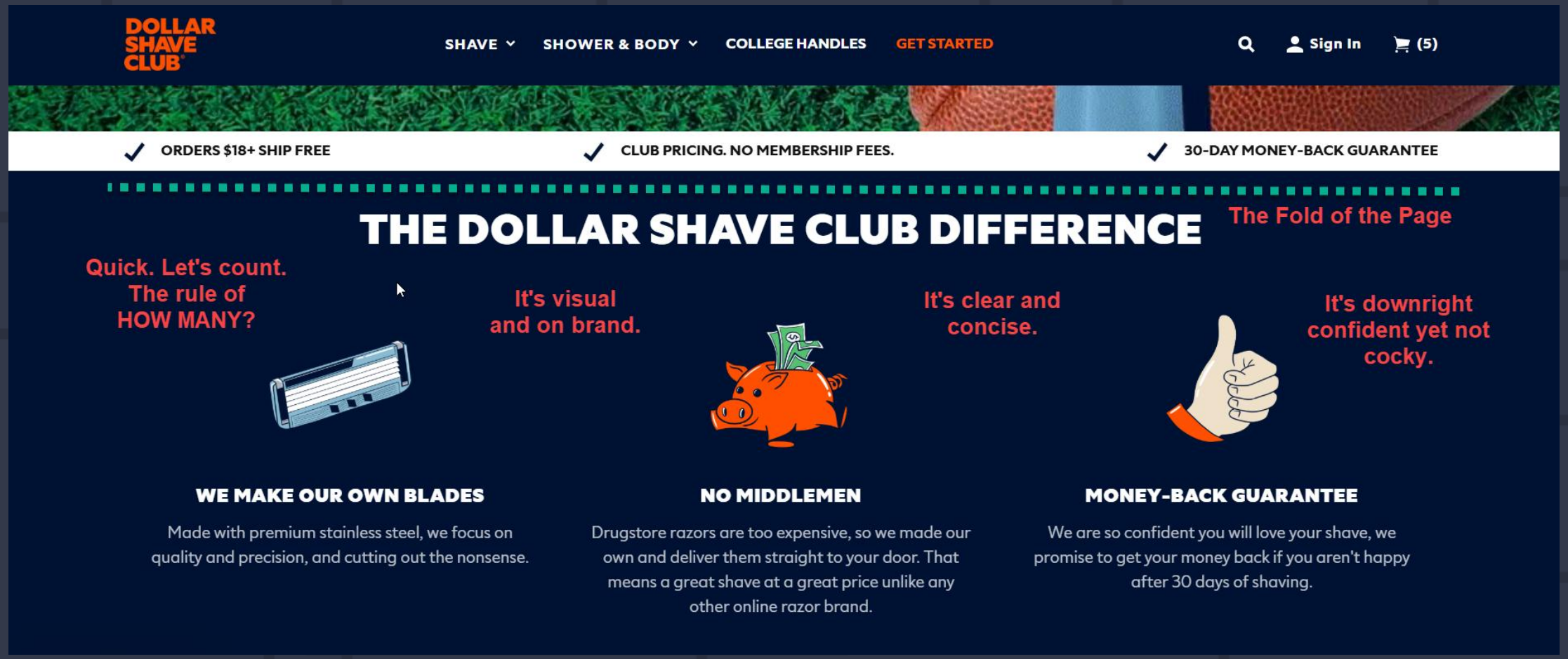
Source: https://twomaidscleaning.com

Fan brand #1: Two Maids Cleaning



Source: https://twomaidscleaning.com

Fan brand #2: Dollar Shave Club



Source: https://us.dollarshaveclub.com

The takeaways:

BRANDS DOMINATING IN THE MARKET DO THESE THINGS

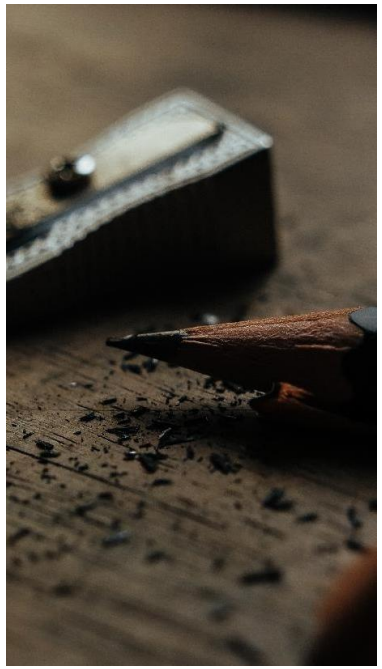
- Have clear a clear tone of voice
- Create the “you get me” moment
  - *Tagline + Value Proposition*
- Address the critical comparison moment
  - *Differentiator Statements*
- Features/benefits and storytelling come later
  - *Order of operations*

Metrics that matter:

SERIOUSLY – TRACK THE HECK OUT OF THEM.

- Pipeline – including quality of prospects
- Revenue and margins
- Sales cycle – overall efficiency
- Conversion rates
- Referrals
- Repeat buying

Now what?



- **Step 1:** Develop your Brand Trifecta® message
- **Step 2:** Implement consistently across ALL channels
- **Step 3:** Try it out for at least 60 – 90 days!
- **Step 4:** Track those metrics while testing
- **Step 5:** Adjust the message if needed

Build a brand that is the path of least resistance to revenue!

Please rate my session.

Like it? Not so much?
Let the INBOUND wizards know!

Head to the INBOUND mobile app to provide your feedback.

Thank you!

~Kate

INBOUND

Get In Touch + Resources

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