



BATTLECARD PDF CREATION GUIDE

Methods for collecting, maintaining, and educating on battlecard info

1. Start With the Right Inputs (Before You Touch the PDF)

Why it matters

Most weak battlecards fail before design. They're built from assumptions instead of evidence.

What to collect (mapped to the template)

- ▶ **Competitor positioning**
 - Homepage headline + subhead
 - Category language they use repeatedly
- ▶ **Claims**
 - "All-in-one," "integrated," "comprehensive," etc.
- ▶ **Sales objections**
 - From real deals, not hypotheticals
- ▶ **Proof**
 - Case studies, speed claims, pricing posture, customer types

Where to source

- ▶ Website (homepage, pricing, case studies)
- ▶ Sales call notes
- ▶ Lost deals + win/loss summaries
- ▶ Competitive sales calls (if available)

Rule

- ▶ If sales hasn't heard it from a prospect, don't include it yet.

2. How to Populate the Template (Section-by-Section Logic)

A. Competitor Overview

Purpose

- ▶ Orient the rep in < 10 seconds

How to fill it

- ▶ One short paragraph
- ▶ Neutral tone
- ▶ No "dunking"

Good signal

- ▶ A rep could read this out loud to a prospect without sounding biased

B. Strengths (Acknowledge, Then Frame)

Purpose

- ▶ Build credibility before differentiation

How to do it

- ▶ List 2–4 real strengths
- ▶ Immediately follow with sales framing, not rebuttals

Rule

- ▶ Never argue facts
- ▶ Reframe why the strength doesn't solve the buyer's real problem

C. Weaknesses / Traps

Purpose

- ▶ Arm reps with pattern recognition

How to do it

- ▶ Translate marketing claims → operational reality
- ▶ Focus on systemic limits, not feature gaps

Examples

- ▶ "Integrated" → aligned data, not surface level display of each system's information
- ▶ "Scale" → slower time-to-impact

D. Claim → Counterpoint

Purpose

- ▶ Live-call utility

How to fill it

- ▶ Use the competitor's exact phrasing
- ▶ Counter with:
 - Plain language
 - Outcome-oriented logic
 - No jargon

Rule

- ▶ If a rep can't say it naturally on a call, rewrite it.

E. Objection Responses (By Buyer Type)

Purpose

- ▶ Reduce rep improvisation

How to fill it

- ▶ Pull objections from:
 - Early-stage buyers
 - Scaleups in transition
- ▶ Separate by buyer context, not title alone

Format discipline

- ▶ Prospect says → You say
- ▶ One response per objection
- ▶ Short enough to memorize

F. Proof Points

Purpose

- ▶ Reinforce claims after differentiation is established

What qualifies as proof

- ▶ Speed-to-impact metrics
- ▶ Before/after outcomes
- ▶ Pattern-level results (not vanity stats)

What doesn't

- ▶ Generic testimonials
- ▶ Awards without context

G. Talk Track

Purpose

- ▶ Anchor the entire card into one coherent narrative

How to write it

- ▶ 3–5 sentences
- ▶ Structured like a conversation, not a pitch
- ▶ Explains:
 - Who they're good for
 - Where they break down
 - Why you exist

H. Quick Comparison + Differentiation

Purpose

- ▶ Close the loop for reps under pressure

Rules

- ▶ Keep it scannable
- ▶ Avoid feature grids
- ▶ Focus on:
 - Speed
 - Co-ordination
 - Operating model

3. Validation Before Publishing (Non-Negotiable)

Why it matters

Unvalidated battlecards destroy sales trust fast.

Validation checklist

- Reviewed by at least one experienced and one new sales rep
- Tested on a live or mock call
- No claims sales can't defend
- Language matches how prospects actually talk

Fast validation method

- ▶ Ask a rep:
"What from the battlecard would you NOT say on a call?"

Fix that first.

4. Maintenance Workflow (Lightweight, Sustainable)

Why it matters

Battlecards decay quietly.

Recommended cadence

- ▶ Quarterly review
- ▶ Immediate update if:
 - There is major competitor repositioning
 - Sales repeatedly flags confusion
 - A new consistent objection appears

Ownership

- ▶ Product marketing owns content
- ▶ Sales provides signal
- ▶ One person approves updates

5. Educating Sales on New or Updated Battlecards

Why it matters

Sending a PDF ≠ enablement.

Minimum enablement

- ▶ 10-minute walkthrough
- ▶ Focus on:
 - What changed
 - When to use it
 - One killer talk track

Best practice

- ▶ Pair the battlecard with:
 - One example deal
 - One example objection

5. Quality Bar (Use This to Say "No")

A battlecard is ready when:

- ▶ A new rep understands the competitor in 2 minutes
- ▶ A senior rep uses it without editing
- ▶ Sales trusts it enough to stop building their own

If it doesn't meet that bar — it's not done.

Creation Principles (TL;DR)

- ▶ Evidence > assumptions
- ▶ Framing > attacking
- ▶ Systems > features
- ▶ Sales language > marketing language
- ▶ Maintenance beats perfection