

# Unlocking Yes

How to See What Holds People Back and Move Them Forward

By Tom Collopy

Most conversations stall long before you know why. **Unlocking Yes** shows you how to see the real reason.

Every important decision moves through four stages of yes: Try, Buy, Adopt, and Refer. When progress stops, it is because one of these yeses is missing. This book shows you how to spot the missing yes and what to do next.

In these pages you will learn how to:

- See the real block behind stalled deals, stuck projects, or hesitating people
- Understand what someone needs before they can move forward
- Create simple messages that remove confusion and build trust
- Guide conversations with clarity instead of pressure

If you work with customers, lead teams, or simply want better conversations with people you care about, this book gives you a practical method for seeing what holds people back and moving them forward with integrity.

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## INTRODUCTION: The 47th Sales Pitch

Sarah was on sales pitch number forty-seven. Every sales pitch before it had ended the same way.

Not casual conversations. Forty-seven formal sales pitches to potential customers who had agreed to sit down and hear her out. People who said yes to the meeting. People who worked in the exact roles she built her product for.

Every sales pitch followed the same pattern.

She would explain the problem her software solved. They would nod.

She would walk through the features. They would lean forward.

She would show the demo. They would smile.

And then, inevitably:

“This is brilliant. I love it.”

Forty-seven times. Zero signups.

After the forty seventh sales pitch, Sarah sat in her car in the parking lot and stared at her steering wheel. She had spent six months building this product. She had talked to hundreds of potential customers during development. Everyone said they needed it. Everyone said they would use it.

She was ready to shut the whole thing down.

Her co-founder called.

“How did it go?”

“Same as always,” Sarah said. “She loved it. Did not sign up.”

“Do you think they are lying?”

Sarah had asked herself this question many times. Were people just being polite? Were they avoiding saying no directly?

“I do not know anymore,” she said.

Her co-founder paused.

“What if they actually meant it?”

“What?”

“What if they really do love it, but something else is stopping them?”

She had never considered this. She had assumed the problem was the product, or her sales pitch, or the market. She had never thought the problem might be something else.

“Like what?” she asked.

“I do not know. But if they loved it forty-seven times and still did not sign up, maybe loving it is not the thing that makes them sign up.”

## **The Question That Changed Everything**

Sarah went back and called five of the people who had said they loved her product. She did not pitch them again. She asked one question:

“You said you loved it. What stopped you from trying it?”

The first person said:

“I meant to. I just was not sure how much time it would take to set up.”

The second:

“I wanted to, but I would need to get my team on board. I was not sure how to explain it to them.”

The third:

“I loved the idea, but I have been burned by tools like this before. I needed to think about whether it was worth the risk.”

Sarah stopped after the third call. She finally understood. They were not lying when they said they loved it. They did love it.

## **Loving Something Does Not Make Someone Try It**

The problem was not her sales pitch.

The problem was not her product.

The problem was that she had been answering the wrong question.

She had been trying to answer:

“Is this product good?”

The question they actually needed answered was:

“Should I take the first tiny step?”

And everything she had been showing them, the features, the vision, the power of what it could do, had nothing to do with that question.

Most of us make the same mistake Sarah made. We think the goal is to get people to say, “This is great.” But “this is great” does not move anyone forward.

## The Four Yeses That Actually Matter

|              |                                      |
|--------------|--------------------------------------|
| <b>TRY</b>   | Will you try this                    |
| <b>BUY</b>   | Will you commit to this              |
| <b>ADOPT</b> | Will you make this part of your life |
| <b>REFER</b> | Will you tell others about this      |

You cannot get the second yes without the first.

You cannot get the third without the second.

You cannot get the fourth without the third.

This sequence is called T-BAR. Each letter comes from one of the four yeses: Try, Buy, Adopt, and Refer.

## What Unlocked Yes

Sarah changed one thing on her landing page. She removed the headline that said:

“Transform your workflow with AI powered automation.”

She replaced it with:

“See it work in sixty seconds. No signup required.”

She added a sixty-second video showing exactly what someone would see when they used the product.

First week: twelve signups.

First month: two hundred signups.

First year: four thousand customers.

The product did not change.

The sales pitch did not get better.

The market did not shift.

She stopped asking “Is the product great”

She started showing them what they needed to see.

Unlocking yes is what this book is about. It is not about convincing people. It is about helping them see enough to take the next step.

## What You Will Learn

1. You will learn why yes unlocks in stages, not in a single moment.
2. You will learn what people need to see before each yes can happen.
3. You will learn how to recognize where someone is stuck.
4. You will learn how to stop pushing and start guiding.

## How the Book Is Organized

This book is designed to take you from understanding why yes unlocks, to seeing it in real conversations, to creating content that moves people forward with clarity. The parts build on each other. Each one gives you the pieces you need for the next.

### Part One: The Four Unlocks

You will learn the four stages every yes moves through and what makes each one unlock. You will see why people stall at different points and what they need to move forward.

### Part Two: The Path to Yes

You will learn how to diagnose which unlock someone is facing, identify the missing need, create the signposts that produce the right takeaways, and refine until yes becomes natural.

### Part Three: When Yes Gets Stuck

You will see how the unlocks show up in real situations. Customers who will not convert. Colleagues who will not buy in. Relationships that have stalled. These chapters show you how to recognize the pattern everywhere.

### Part Four: Creating Content With T-BAR

You will walk through the process of writing Try, Buy, Adopt, and Refer content by hand. You will see why the first attempts feel messy, why doubt shows up, and how T-BAR guides the structure. Outbox is used as the running example so you can see the work in context.

### Part Five: Using T-BAR Every Day

You will learn how to use T-BAR in everyday communication, build judgment, troubleshoot confusion, and pair human clarity with AI support without losing control.

The appendices are tools and references you may want to use after reading the book.

Once you see how yes unlocks, you cannot unsee it. Hesitation becomes information.

Resistance becomes predictable. Progress becomes designable.

And the word “no” stops feeling like rejection. It becomes a diagnosis.

Let's begin.

# PART ONE: The Four Unlocks

## Chapter 1: How Yes Actually Works

Michael had been trying to get his team to use the new project management tool for three months.

He'd shown them the features.

All twelve of them sat through the demo. They nodded. They said it looked great.

He'd explained the benefits.

Fewer missed deadlines. Better visibility. Less time in status meetings. They agreed. It sounded good.

He'd walked them through exactly how to use it.

He'd created a guide. He'd offered to help anyone who got stuck.

Still, three months later, only two people were using it. The rest had gone right back to the chaotic mess of email threads and Slack messages that the tool was supposed to replace.

Michael was baffled.

"They saw how good it was. Why won't they just use it?"

His manager asked him a simple question:

"Did you ever ask them what stopped them?"

Michael hadn't. He'd assumed the problem was that he hadn't explained it well enough. So he'd explained it again. And again. And when that didn't work, he'd added more features to the demo.

But explanation wasn't the problem.

### The Logic Trap

When someone hesitates, most of us respond the same way Michael did. We add more explanation. More detail. More logic. More reasons why they should say yes. We assume hesitation is a logic problem. If they just understood better, they'd move forward.

But hesitation is rarely about logic. Hesitation is a signal.

It's the mind saying:

"I don't yet have what I need to feel comfortable moving forward."

Sometimes what's missing is understanding. Sometimes it's belief. Sometimes it's trust, relevance, timing, or safety. Each of these comes from a different kind of signpost.

And if that signpost never appeared, or if it appeared but created the wrong takeaway, the next yes cannot unlock.

## Signposts and Takeaways

Before we go further, you need two definitions.

**A signpost** is anything that helps someone understand or believe something they need to understand or believe to move forward.

A signpost can be:

- A message on a landing page
- Something you say in a conversation
- A demo you show
- A testimonial someone reads
- A guarantee you offer
- The way you respond when someone asks a question

Every signpost is designed, intentionally or accidentally, to create a **takeaway**.

**A takeaway** is what someone actually understands or believes after encountering your signpost.

- You have an *intended takeaway*: the shift you want to create.
- They form an *actual takeaway*: what they really took from what you showed them.

When the actual takeaway matches the intended takeaway the person moves closer to yes.

When it doesn't match, they stall.

## Three Moments

Let me show you what this looks like.

### Business: The Three-Minute Setup

A founder kept hearing people say his product looked interesting, but nobody signed up for the free trial.

- He tried improving his pitch.
- He tried adding social proof.

- He tried offering a discount.

Nothing changed.

Then he looked at his signup page and realized: nowhere did it say how long setup would take.

People were imagining it would take hours. Maybe days. And that invisible assumption was creating a takeaway he never intended:

"This is going to be a hassle."

He added one line to the page:

"Setup takes less than three minutes."

Signups doubled that week. Same product. Same price. Same features. Different takeaway.

The signpost:

"Setup takes less than three minutes."

The intended takeaway:

"The first step is simple."

Once that takeaway formed, the Try yes was unlocked.

### **Work: The Competitor Deadline**

An employee had pitched the same idea to her manager three times. Each time, he'd listened, asked a few questions, and said he'd think about it.

Then nothing.

She assumed he wasn't interested. She was about to give up.

Then she realized: he wasn't saying no. He just wasn't saying yes right now.

So she added one new piece of information to her pitch:

"If we wait another quarter, our competitor will launch their version first."

Her manager approved the project that afternoon.

The signpost:

"If we wait, they launch first."

The intended takeaway:

"This matters now."

Once that takeaway formed, Buy unlocked.

### **Life: The Safe Conversation**

A man needed to talk to his partner about something that was bothering him. Every time he tried, she shut down.

He thought he needed to explain it better. He'd try to walk her through his reasoning, step by step.

It never worked. The more he explained, the more she withdrew.

Then he realized: she didn't need more explanation. She needed to feel safe.

The next time he brought it up, he said:

"I want to share something with you. You don't need to fix anything or respond right away. I just want you to hear it."

She relaxed. They had the conversation.

The signpost:

"You don't need to fix anything. I just want to share."

The intended takeaway:

"It's safe to listen."

Once that takeaway formed, the next yes unlocked.

### **The Pattern**

The pattern is the same every time.

- A yes doesn't unlock because you pushed harder.
- A yes doesn't unlock because you explained more.
- A yes unlocks when the signposts you show create the takeaways someone needs.

And here's what most people miss:

the takeaway someone needs changes as they move forward.

The takeaway that unlocks

"I'll try this" is different from the takeaway that unlocks "I'll commit to this."

The takeaway that unlocks

"I'll make this part of my routine" is different from the takeaway that unlocks "I'll tell others about this."

Each of these is a separate yes. Each requires different signposts.

If you show someone signposts for the wrong stage, they stay stuck, even if the signposts are good.

### **Back to Michael**

Remember Michael and his team?

He'd been showing them signposts that answered:

"Is this product powerful?"

But that wasn't the question stopping them.

The question stopping them was:

"Is it safe to try this without disrupting everything that's already working?"

He never answered that question. So that takeaway never formed. So the yes never unlocked.

When Michael finally asked his team what stopped them, here's what they said:

"I didn't want to mess up the system we already have."

"I wasn't sure what would happen to our existing projects if I switched."

"It seemed like it would take a lot of time to set up."

These aren't objections. They're missing takeaways.

Michael wasn't failing because his tool was bad. He was failing because he was creating the wrong takeaways for the stage his team was in.

### **What Changes When You See This**

Once you understand that yes unlocks through takeaways, everything about influence changes.

You stop asking:

"How do I convince them?"

You start asking:

"What do they need to understand or believe right now, at this stage, to feel ready for the next step?"

You stop pushing harder when someone hesitates.

You start looking for which takeaway is missing.

You stop treating "no" as rejection.

You start treating it as information about which signpost needs to be shown.

Influence stops being about force. It becomes about design.

You design the signposts that create the takeaways that unlock yes.

And the first step is understanding that there isn't just one yes.

There are four.

## Chapter 2: The First Unlock - TRY

David spent fifty thousand dollars building the perfect sales demo.

It was comprehensive.

It covered every feature.

It addressed every possible objection.

It showed exactly how powerful his platform was.

He'd worked with a professional demo designer. The flow was flawless. The visuals were stunning.

He was sure this would be the thing that finally got customers to sign up. Thirty-minute presentation. Full walkthrough. Every capability on display.

His conversion rate from demo to trial signup: 3%.

Three percent.

Meanwhile, his competitor, who had a worse product, a smaller team, and less funding, was converting at 34%.

David couldn't figure it out. His demo was objectively better. More thorough. More professional. More impressive.

What was he missing?

### The Try Mistake

Here's what David missed: he was selling Buy when people needed Try.

His thirty-minute comprehensive demo was designed to convince someone to commit. To make a decision. To choose his platform over the alternatives.

But the people watching his demo weren't ready to make that decision yet.

They were facing a much smaller, much more fragile question:

"Should I give this thing a chance?"

Try is the smallest yes.

It's not "I'm committed." It's "I'll take a tiny step and see what happens."

A trial signup. A first conversation. A quick test. A single attempt.

Try is fragile because it requires almost nothing from you, but it still feels like a risk to the person considering it.

If there's any friction, any confusion, any sense that this might be complicated or time-consuming or risky, they won't do it.

Even if they like the idea.

Even if they agree it would be useful.

Even if they tell you it's great.

### **What Try Requires**

David's competitor wasn't converting better because their product was better. They were converting better because they understood what Try required.

Their "demo" was a ninety-second video showing one simple thing the tool did, followed by: "Try it free—no signup required. Just click and start using it."

That's it.

No thirty-minute presentation. No comprehensive walkthrough. No deep dive into every feature.

Just: here's what this is, here's what it does, try it right now if you want.

David's demo satisfied Buy needs: value, trust, competitive advantage, ROI.

His competitor's demo satisfied Try needs: clarity, simplicity, safety.

Same market. Same customers. Different stage.

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## The Seven Try Needs

Try unlocks when seven specific takeaways form, each tied to the following needs.

|                       |                                                                              |
|-----------------------|------------------------------------------------------------------------------|
| <b>AWARENESS</b>      | <b>They need to understand the basic nature of the thing, not the vision</b> |
| <i>Doesn't Meet</i>   | "A revolutionary productivity ecosystem"                                     |
| <i>Meets</i>          | "A tool that keeps all your tasks in one place"                              |
| <i>Why It Matters</i> | If people cannot quickly grasp what something is, they will not try it       |
| <b>PROBLEM</b>        | <b>They need to see a problem they already feel, not one you claim</b>       |
| <i>Doesn't Meet</i>   | "Inefficient workflow processes"                                             |
| <i>Meets</i>          | "You waste an hour every day switching between apps"                         |
| <i>Why It Matters</i> | If the problem does not resonate, they have no reason to try the solution    |
| <b>SOLUTION</b>       | <b>They need a simple understanding of how it works in plain language</b>    |
| <i>Doesn't Meet</i>   | "Leverages AI powered algorithms to optimize task allocation"                |
| <i>Meets</i>          | "It automatically syncs your calendar, email, and task list"                 |
| <i>Why It Matters</i> | If they cannot imagine how it works, they cannot imagine trying it           |
| <b>SAFETY</b>         | <b>They need it to be safe, low pressure, without risk or commitment</b>     |
| <i>Doesn't Meet</i>   | "Start your 14-day trial"                                                    |
| <i>Meets</i>          | "Try it without creating an account"                                         |
| <i>Why It Matters</i> | If trying feels risky, people avoid it even when they are interested         |
| <b>OUTCOME</b>        | <b>They need to see an immediate and meaningful gain from trying</b>         |
| <i>Doesn't Meet</i>   | "Transform your productivity"                                                |
| <i>Meets</i>          | "See if this saves you time today"                                           |
| <i>Why It Matters</i> | If the outcome of trying is unclear, the effort does not feel worth it       |
| <b>EFFORT</b>         | <b>They need to see it look easy, fast, and low in activation energy</b>     |
| <i>Doesn't Meet</i>   | No mention of time or effort                                                 |
| <i>Meets</i>          | "Setup takes less than three minutes"                                        |
| <i>Why It Matters</i> | If the effort seems high, they delay trying even if they want to try         |
| <b>TIMING</b>         | <b>They need to be able to try it right away.</b>                            |
| <i>Doesn't Meet</i>   | "Schedule a demo with our team"                                              |
| <i>Meets</i>          | "Try it right from your browser"                                             |
| <i>Why It Matters</i> | If trying requires planning, it usually will not happen                      |

## When Try Fails

Let me show you three real examples of Try failing, and why.

### The Overcomplicated Onboarding

A company required new users to provide:

- Email
- Password
- Company name
- Job title
- Team size
- Primary goals
- Phone number

Abandonment rate: 68%.

They thought they were being thorough. They wanted to understand their users.

But each field added friction. Each question created hesitation. The intended takeaway was "We're professional and organized."

The actual takeaway was "This is already too much work."

They changed it to: email only. Everything else was optional or collected later.

Abandonment rate dropped to 23%.

Same product. Different Try signposts.

### The Pitch That Skipped Try

A consultant kept telling prospects about her "strategic realignment frameworks" and "organizational transformation methodology."

She was showing them Buy-level content: the strategic value, the competitive advantage, the long-term impact.

But they hadn't unlocked Try yet. They didn't understand what she actually did.

When she finally asked a prospect what stopped them from moving forward, they said: "I still don't really understand what you do."

She changed her opening to: "I help teams stop missing deadlines by fixing how they communicate about priorities."

Awareness need satisfied. Try unlocked.

## The Missing Safety Signal

Someone on a dating app sent a first message: "We should get dinner this weekend."

No response.

Why? Because dinner is a Buy-level commitment. It requires:

- Time (2-3 hours)
- Planning (schedule coordination)
- Social risk (awkward if it doesn't go well)
- Physical safety concerns

That's not Try. That's Buy.

They tried again with a different person: "I noticed you also like hiking. Ever been to the trails near Morrison? I'm always looking for new recommendations."

Response within an hour. Conversation started.

Why? Because this is Try:

- Low time commitment (just a message)
- Low risk (sharing trail recommendations)
- Clear topic (hiking)
- Safe (no immediate meetup required)

Same person. Same goal. Different stage.

## The Try Diagnostic

When someone won't try, ask yourself:

### 1. Do they understand what this actually is?

If you're using jargon, vision statements, or strategic language, they probably don't.

### 2. Do they see a problem they already feel?

If you're explaining problems they don't recognize, they have no reason to care.

### 3. Does the first step feel simple and safe?

If you're asking for commitments, time, or information that feels excessive, they'll hesitate.

### 4. Have I accidentally made Try feel like Buy?

If your Try signposts show long-term value, strategic importance, or comprehensive solutions, you're solving for the wrong stage.

## The Try Principle

Make the first yes so small and safe that hesitation feels harder than action.

David eventually rebuilt his sales process.

Instead of the thirty-minute demo, he created a two-minute video showing one simple workflow. Below it:

"Try it now—no signup required."

People who clicked got dropped into a sandbox version of the product.

They could use it immediately.

- No forms
- No commitments
- No friction

If they wanted to save their work, *then* they could sign up.

His conversion rate went from 3% to 28%.

The product didn't change. The pitch didn't get better.

He just started satisfying Try needs instead of Buy needs.

When Try unlocks, people take the first step.

And that first step is what makes everything else possible.

## Chapter 3: The Second Unlock - BUY

Rachel's SaaS product had ten thousand trial signups every month.

Ten thousand people took the first step. They created accounts. They used the product during their trial. Many of them used it daily.

But only 180 converted to paid accounts.

That's a 1.8% conversion rate.

Her exit surveys all said the same thing:

"Not sure it's worth it."

Rachel was confused. The people who paid loved the product. Her retention was great. Her customers were getting tremendous value.

So why weren't more trial users converting?

- She assumed the problem was price.
- She tested different pricing tiers. Didn't help.
- She assumed the problem was the trial length.
- She tested 7 days, 14 days, 30 days. Didn't matter.
- She assumed the problem was unclear value proposition.
- She rewrote her landing page six times. Nothing changed.

The product was working. The trials were active. But Buy wasn't unlocking.

### The Buy Problem

Here's what Rachel eventually figured out: her trial satisfied Try needs, but it never built toward Buy needs.

People were *using* the product. But they weren't *experiencing the value*.

They'd sign up. They'd create some tasks. They'd click around. They'd use it like they'd use any task manager.

But they never saw:

- How much time they were saving
- How their team's performance improved
- How this was better than what they'd been doing before

The product was delivering value. But the value was invisible.

Users experienced the *features* during the trial. They never experienced the *value*.

And without experiencing value, Buy can't unlock.

## Try vs. Buy

Let me be clear about the distinction:

**Try signposts create comfort.**

They answer: Is this safe? Is this simple? Can I understand what this is?

**Buy signposts create confidence.**

They answer: Is this worth it? Will this work for me? Can I trust this?

Try is about lowering the barrier to the first step. Buy is about raising confidence in the commitment.

If you show Try signposts to someone facing Buy, they stay stuck. They'll think: "Yes, it seems simple and safe. But is it actually worth paying for?"

If you show Buy signposts to someone facing Try, they get overwhelmed. They'll think: "This sounds powerful, but I'm not ready to evaluate all of this yet."

The signpost must match the stage.

## The Seven Buy Needs

Buy unlocks when seven specific takeaways form, each tied to one of the seven Buy needs.

| <b>Problem–<br/>Solution Fit</b> | <b>They need to believe this works for someone like them</b>                |
|----------------------------------|-----------------------------------------------------------------------------|
| <i>Doesn't Meet</i>              | "Teams love this"                                                           |
| <i>Meets</i>                     | "Here is how a 10 person marketing team uses this"                          |
| <i>Why It Matters</i>            | If they cannot see themselves in the success stories, they will not buy     |
| <b>Value</b>                     | <b>They need to believe the return is worth the cost</b>                    |
| <i>Doesn't Meet</i>              | "Saves time"                                                                |
| <i>Meets</i>                     | "Teams reduce rework by 40 percent"                                         |
| <i>Why It Matters</i>            | If the value is vague, the cost feels too high                              |
| <b>Risk</b>                      | <b>They need to feel the downsides are manageable</b>                       |
| <i>Doesn't Meet</i>              | ignoring risk                                                               |
| <i>Meets</i>                     | "Cancel anytime with no penalty. We will help you export your data."        |
| <i>Why It Matters</i>            | If the risk feels too high, they will wait indefinitely                     |
| <b>Trust</b>                     | <b>They need confidence in the people behind the product</b>                |
| <i>Doesn't Meet</i>              | generic claims                                                              |
| <i>Meets</i>                     | "We support more than ten thousand teams" or "Here is our uptime history"   |
| <i>Why It Matters</i>            | If trust is missing, everything else collapses                              |
| <b>Emotion</b>                   | <b>They need the decision to feel right, not just make sense</b>            |
| <i>Doesn't Meet</i>              | "Efficient task management"                                                 |
| <i>Meets</i>                     | "Imagine how calm your week will feel"                                      |
| <i>Why It Matters</i>            | If the emotional fit is missing, they will invent rational reasons to delay |
| <b>Path</b>                      | <b>They need to know exactly how to move forward</b>                        |
| <i>Doesn't Meet</i>              | "Contact sales for pricing"                                                 |
| <i>Meets</i>                     | "Select a plan and click confirm, setup continues automatically"            |
| <i>Why It Matters</i>            | If the next step is unclear, they will stall                                |
| <b>Urgency</b>                   | <b>They need a reason to act now rather than later</b>                      |
| <i>Doesn't Meet</i>              | no reason to act now given to the customer                                  |
| <i>Meets</i>                     | "Every week you wait costs you more than five hours you could be saving"    |
| <i>Why It Matters</i>            | Without urgency, they delay indefinitely even when they are convinced       |

## When Buy Fails

Let me show you three scenarios where Buy stayed locked.

### The Undefined Value

A company sold "collaboration software."

Their messaging focused on features:

"Real-time editing, version control, integrated comments."

Trial users would use it. They'd say it was fine. They wouldn't convert. Why? Because the value was never made concrete.

They changed their messaging to:

"Cut your meeting time by 30%."

Same features. Same product. Now the value was specific and measurable.

Conversion doubled.

### The Missing Risk Mitigation

A prospect was interested in an expensive enterprise tool. During the sales call:

**Prospect:** "What if we switch and it doesn't work out?"

**Seller:** "It will work. We have great support."

This doesn't satisfy the Risk need.

The prospect needed to hear:

"We have a 60-day full refund policy. If you decide it's not right, we'll help migrate you back to your old system at no cost."

The first answers:

"Will it work?" (which can't be proven in advance).

The second answers:

"What happens if it doesn't?" (which can be guaranteed).

The second one unlocks Buy.

### The Emotion Mismatch

An enterprise software company marketed their product on "cutting-edge AI capabilities."

**Their intended takeaway:** excitement about innovation.

**The actual takeaway from buyers:** "This sounds complicated and risky."

They changed their messaging to:

"Simple automation that just works."

Same product. Different emotional frame.

Buyers stopped seeing risk. They started seeing relief.

## **Rachel's Solution**

Remember Rachel? 1.8% conversion from trial to paid? She didn't change the product. She didn't change the price.

She changed what people experienced during the trial.

### **Day 2 of trial:**

**Email showing:** "You've already saved 45 minutes compared to managing tasks the old way."

**Value:** satisfied.

**In-app dashboard:** Running counter of time saved, tasks completed faster, team collaboration metrics.

**Value:** reinforced.

### **Day 7 of trial:**

**Case study** from a similar company showing specific ROI: "15-person team saved 8 hours per week, paid for itself in the first month."

**Problem-solution fit:** satisfied.

### **Day 10:**

**Email saying:** "Here's what you'd lose if you go back to email and Slack for task management" — showed the hidden costs of their old approach.

**Value:** satisfied (not just "this is good" but "going back is worse").

### **Day 12:**

**Email saying:** "Not sure yet? We'll extend your trial 7 days, no strings attached."

**Risk:** reduced.

**Pressure:** removed.

Her conversion rate went from 1.8% to 16%.

Same product. Same price. Same trial length.

Different Buy signposts.

## The Buy Diagnostic

When someone won't buy, ask yourself:

### Can they see themselves in the solution?

Generic success stories don't create Buy. Specific, relatable examples do.

### Is the value concrete and measurable?

"Better" and "faster" are vague. "40% reduction" and "5 hours saved per week" are concrete.

### Have you named and addressed the risks?

Ignoring risk doesn't make it go away. Acknowledging and mitigating it does.

### Does the emotional tone match their state?

Excitement works for some buyers. Calm and reliability work for others. Match the emotion to the buyer.

## The Buy Principle

People commit when the case for yes is stronger than the case for waiting.

Not "stronger than no."

Stronger than "maybe later."

Because most people don't say no.

They say "let me think about it" and never come back.

Your job is to make waiting feel like the worse option. Not through pressure. Through clarity.

When all seven Buy needs are satisfied, commitment becomes the obvious next step.

## Chapter 4: The Third Unlock - ADOPT

Tom built a fitness app.

It had great workouts. An intuitive interface. Personalized plans. Integration with wearables. Everything users said they wanted.

**Month one:** 100,000 downloads. He celebrated. This was it. This was traction.

**Month two:** 12,000 still using it.

**Month three:** 4,000 still using it.

88% of people who tried it stopped using it within eight weeks.

The app wasn't broken. Reviews were positive. People who kept using it loved it. But most people tried it once or twice, then forgot about it.

Tom had unlocked Try (100,000 downloads) and Buy (people paid for premium features).

But he'd failed at Adopt.

### Why Buy ≠ Adopt

Here's what Tom learned the hard way: getting someone to buy is not the same as getting them to adopt.

**Buy is a single decision:** “I will commit to this.”

**Adopt is many small decisions:** “I will use this again today.”

Buy happens in a moment. Adopt happens over time.  
And each one depends on different signals.

**Buy signals point to future value:** “This will help you.”

**Adopt signals point to current value:** “This is helping you right now.”

Buy is about believing in a future benefit.  
Adopt is about experiencing that benefit in the present.

**Buy signals build confidence:** “I believe this will work.”

**Adopt signals build lived experience:** “This is working.”

Buy happens once.  
Adopt keeps happening.

**Buy sounds like:** “I am in.”

**Adopt sounds like:** “I am still in.”

Most businesses obsess over getting customers. Then they lose them because they never designed for Adopt.

## The Peloton Paradox

Think about Peloton bikes. People buy them. They're expensive—\$1,500+. People make that commitment. Many of those Pelotons become expensive coat racks.

Why?

Because Buy unlocked (people committed), but Adopt didn't (people didn't integrate it into their lives). The bike didn't fail. The adoption signposts failed.

Peloton knows this. That's why they've invested heavily in:

- Live classes (creates routine)
- Leaderboards (creates ongoing motivation)
- Streaks and badges (makes progress visible)
- Social features (creates accountability)

These aren't features of the bike. They're Adopt signposts. They help people answer the question: "Will I use this again tomorrow?"

## The Six Adopt Needs

Adopt unlocks when six specific takeaways form and *stay formed* over time, each one tied to one of the six Adopt needs.

|                       |                                                                               |
|-----------------------|-------------------------------------------------------------------------------|
| <b>Ongoing Value</b>  | <b>They need to feel the product still helps them in practice</b>             |
| <i>Doesn't Meet</i>   | "You'll save time"                                                            |
| <i>Meets</i>          | "You saved 2 hours this week"                                                 |
| <i>Why It Matters</i> | If they cannot feel ongoing value, they drift away even if they paid          |
| <b>Routine Fit</b>    | <b>They need it to fit naturally into how they already work or live</b>       |
| <i>Doesn't Meet</i>   | requiring new habits                                                          |
| <i>Meets</i>          | "Works inside Slack" or "Takes 5 minutes during your morning coffee"          |
| <i>Why It Matters</i> | If it requires changing established routines, it will not stick               |
| <b>Support</b>        | <b>They need to feel supported whenever they need help</b>                    |
| <i>Doesn't Meet</i>   | "Email support at company dot com"                                            |
| <i>Meets</i>          | "Message us anytime, average response is 5 minutes"                           |
| <i>Why It Matters</i> | If people get stuck and feel alone, they abandon                              |
| <b>Reliability</b>    | <b>They need to feel they can count on the product every time</b>             |
| <i>Doesn't Meet</i>   | inconsistent experience                                                       |
| <i>Meets</i>          | "Works the same way every time" or "99.9 percent uptime"                      |
| <i>Why It Matters</i> | If the experience is unpredictable, they will not rely on it                  |
| <b>Progress</b>       | <b>They need to feel the product continues to improve</b>                     |
| <i>Doesn't Meet</i>   | static product                                                                |
| <i>Meets</i>          | "Here is what you unlocked this week" or "New feature based on your feedback" |
| <i>Why It Matters</i> | If it feels stale, people start looking for alternatives                      |
| <b>Preference</b>     | <b>They need to continue to feel this is still the best option</b>            |
| <i>Doesn't Meet</i>   | assuming loyalty                                                              |
| <i>Meets</i>          | "Going back to your old system would add 3 steps to every workflow"           |
| <i>Why It Matters</i> | If switching back feels easier than staying, people will switch               |

## The Three Moments When Adoption Falls Apart

Every new user begins with hope. But along the way there are three predictable moments where things fall apart. Each moment has its own trap, and its own way out.

### Moment One: The Confidence Question

**It's week one.** The user has started, they are curious, and they have put in a bit of effort. But they are not getting much feedback. There is no clear signal about how they are doing. The user pauses and asks:

“Am I on track?”

Successful products build confidence at this moment. Duolingo does it by saying:

“You are on a 3-day streak!”

The message builds confidence before doubt has a chance to take hold.

### Moment Two: The Value Question

**It's week four.** The newness has worn off. The habit has not formed yet. The user pauses and asks:

“Is this actually helping?”

This doubt kills adoption unless value appears right when motivation dips.

Great apps surface proof at this exact moment:

“You have completed 12 workouts, and that is 8 more than most people do in their first month.”

The signpost makes progress visible when the user cannot feel it.

### Moment Three: The Habit Question

**It's month three.** The question is simple:

“Is this part of my life or not?”

If the product has not become habitual, it will not. But if it has, adoption is locked in.

Slack nails this moment. Notifications become part of the work rhythm. It is no longer “a tool you use.” It becomes “how you work.”

Integration is complete.

## When Adopt Fails

Let me show you three real failures of Adopt.

### The Manager Who Lost His Team

A manager pushed through a new workflow for his team. He got buy-in from leadership. He showed everyone how to use it.

Everyone agreed it was better. Buy unlocked.

Three weeks later, they'd all reverted to the old way.

What was missing?

- Ongoing check-ins (Support need)
- Celebrating early wins (Ongoing Value need)
- Adjusting based on feedback (showing it could fit their actual workflow)

He got Buy. He never designed for Adopt.

### The Relationship That Faded

A couple made a commitment to each other. They were serious. They were "in."

But over time, they drifted apart.

They were still together. But the connection was gone.

What happened?

- They stopped creating shared experiences (Routine Fit failing)
- They stopped being reliable for each other (Reliability failing)
- They stopped investing in the relationship (Ongoing Value not being created)

They had Buy. They lost Adopt.

Commitment without ongoing investment doesn't last.

### Tom's Fitness App

Remember Tom? 100,000 downloads, 4,000 still using it by month three?

He interviewed people who'd stopped using the app.

Common answers:

- "I forgot about it"
- "It felt like just another app"
- "I didn't really see results"

- "It was hard to keep up with"

Translation:

- Routine Fit: failed (it never became part of their day)
- Ongoing Value: failed (results weren't visible)
- Support: failed (when they struggled, no one helped)

Tom rebuilt the onboarding:

### **Week 1:**

"Let's build your first routine" - specific time of day, specific workout, specific trigger

"You burned 300 calories today—that's 2 cookies' worth!" - made value visible and relatable

### **Week 2:**

Notification if no activity: "Stuck? Here's the most common issue beginners face"

### **Ongoing:**

Weekly summary showing progress, comparisons, and streaks

Month three retention went from 4% to 42%.

Same app. Different Adopt signposts.

## **The Adopt Diagnostic**

When people aren't sticking around, ask yourself:

### **Can they see and feel the value regularly?**

If value is invisible or only shows up long-term, they won't stay.

### **Does this fit into their existing life?**

If it requires new routines or significant disruption, it won't stick.

### **What happens when they get stuck?**

If they're on their own, they'll give up.

### **Is the experience reliable?**

If it's inconsistent or breaks, they'll lose trust.

## The Adopt Principle

Buy gets you in the door. Adopt keeps you in the house. Never assume Buy means Adopt will follow.

They're different yeses with different requirements.

Most business failures aren't "we couldn't get customers."

They're "we got customers, but couldn't keep them."

That's an Adopt failure. And Adopt failures happen because the ongoing experience doesn't satisfy the ongoing needs.

When Adopt unlocks, people don't just use your product. They integrate it into their lives. It becomes part of how they operate.

And that's when the fourth unlock becomes possible.

## Chapter 5: The Fourth Unlock - REFER

Sarah's company had 10,000 active users. Customer satisfaction score: 95%. When asked "Would you recommend this to a colleague?" 94% said yes. Actual referral rate: Less than 5%.

Sarah was baffled. People loved the product. They said they'd recommend it. But they didn't. She assumed referrals just happened naturally when customers were happy.

They don't.

### The Referral Mystery

Here's what Sarah learned: loving something doesn't automatically lead to recommending it. Refer is different from every other unlock because it's not about the person anymore. It's about their willingness to stake their reputation on bringing someone else in.

That requires a completely different set of takeaways. Most companies think:

"If customers are happy, they'll refer."

But happiness isn't enough. Satisfaction isn't enough. Even genuine love for the product isn't enough.

Refer requires:

- Confidence that the referral will have a good experience
- A simple way to explain what this is
- A moment that triggers the thought "I should tell someone"
- Motivation to actually do it

Miss any of these, and referrals don't happen—even from your biggest fans.

### Why Refer Is Different

**Try, Buy, and Adopt are about the person's own journey.**

- Try: Should I give this a chance?
- Buy: Should I commit?
- Adopt: Should I keep using this?

**Refer is about helping someone else begin their journey.** That shift changes everything. Now they're asking:

- Will this make me look good or bad?
- Will my friend/colleague have a good experience?

- How do I even explain this?
- Is it worth my time and social capital?

These are new concerns that weren't present in Try, Buy, or Adopt.

## The Six Refer Needs

Refer unlocks when six specific takeaways form and stay formed over time, each one tied to one of the six Refer needs.

| <b>Reputation</b>     | <b>They need to feel recommending will make them look good.</b>              |
|-----------------------|------------------------------------------------------------------------------|
| <i>Misses</i>         | ignoring reputation                                                          |
| <i>Meets</i>          | “Your recommendation led to a 30 percent improvement in their team’s output” |
| <i>Why It Matters</i> | If recommending does not make them look smart, they will not do it           |

| <b>Safety</b>         | <b>They need to feel their referral will have a good experience.</b>            |
|-----------------------|---------------------------------------------------------------------------------|
| <i>Misses</i>         | assuming quality is obvious                                                     |
| <i>Meets</i>          | “Everyone you refer gets personal onboarding from our team”                     |
| <i>Why It Matters</i> | If they worry the referral might regret it, they will not risk the introduction |

| <b>Story</b>          | <b>They need a simple, clear narrative they can share.</b>   |
|-----------------------|--------------------------------------------------------------|
| <i>Misses</i>         | complex value proposition                                    |
| <i>Meets</i>          | “It helped us stay organized without adding work”            |
| <i>Why It Matters</i> | If they cannot explain it in one sentence, they will not try |

| <b>Care</b>           | <b>They need to trust you will treat their referral well.</b>                       |
|-----------------------|-------------------------------------------------------------------------------------|
| <i>Misses</i>         | aggressive sales follow up                                                          |
| <i>Meets</i>          | “We will reach out once. If they are not interested, we will not bother them again” |
| <i>Why It Matters</i> | If they think you will harass their referral, they will not make the introduction   |

| <b>Appreciation</b>   | <b>They need to feel their referral is valued.</b>                    |
|-----------------------|-----------------------------------------------------------------------|
| <i>Misses</i>         | taking referrals for granted                                          |
| <i>Meets</i>          | “Thank you for the introduction. This means everything to us”         |
| <i>Why It Matters</i> | If you do not appreciate the referral, they will not make another one |

| <b>Motivation</b>     | <b>They need to feel the referral is worth their effort.</b>                                           |
|-----------------------|--------------------------------------------------------------------------------------------------------|
| <i>Misses</i>         | assuming goodwill is enough                                                                            |
| <i>Meets</i>          | “You get a month free for each referral” or “You are helping your network discover something valuable” |
| <i>Why It Matters</i> | If there is no motivation, people will not bother                                                      |

## When Refer Fails

Let me show you three stories of Refer staying locked.

### The Unmemorable Experience

A customer used a service for two years. They were perfectly satisfied. NPS score: 9/10.

When asked: "Would you recommend us?" they said "Absolutely."

When asked: "Have you recommended us?" they paused. "I... don't think so."

Why not?

"I mean, it's good. But there's nothing I'd really say about it. It just works."

Nothing remarkable = nothing to remark about.

The experience was good but forgettable. No story to tell. Story need: not satisfied.

The company started sending customers: "Here's what you accomplished this quarter" with specific, impressive metrics.

Referrals tripled.

Why? Because now customers had something to say: "This tool helped me close 40% more deals this quarter."

### The Reputation Risk

A person loved their therapist. Genuinely life-changing experience. Never referred a single person.

Why?

"What if my friend goes and doesn't like them? What if they have a bad experience? That's on me."

Safety need: not satisfied.

The therapist could have said:

"I know every client is different. I always do a free 30-minute fit assessment first. If it's not a good match, I'll recommend someone who'd be better."

That would have satisfied Safety. But it was never said. So, Refer never unlocked.

## The Missing Motivation

A B2B company had incredibly happy customers. High retention. Great reviews. But almost no organic referrals.

They surveyed customers: "Would you recommend us?" Nearly everyone: "Yes."

"Have you recommended us?" Almost no one: "No... I guess I never thought about it."

No trigger moment. No prompt. No motivation.

They added one feature: "Invite a colleague to try this. When they sign up, we'll donate \$500 to a charity of your choice."

Referrals increased 10x.

The product didn't change. The motivation did.

## The Adoption-Referral Link

Here's something critical: you can't have Refer without Adopt. People don't advocate for things they tried once or bought but don't use. Referrals come from sustained, positive experiences.

One great moment  $\neq$  referral.

Many reliable moments = advocacy.

This is why Refer is the last unlock. It can't happen without the three before it.

**Try unlocked** = they gave it a chance

**Buy unlocked** = they committed

**Adopt unlocked** = they integrated it into their life

**Refer unlocks** = they're so confident in it that recommending feels like helping, not risking

## Sarah's Solution

Remember Sarah? 95% satisfaction, 5% referral rate?

She made four changes:

### 1. Added a "Share This" button at the moment of success

When someone completed a key action: "Want to share this with your team?"

Created a natural trigger moment. (Motivation + Story)

## 2. Pre-wrote the message

"I just used [tool] to [specific result]. Made it way easier. Here's a free template to try."

Made the Story simple. One sentence + outcome + low-friction Try for the referral.

## 3. When referral signed up, notified the referrer

"Thanks for introducing us to [Name]. They're already seeing results with the template you shared."

Appreciation + Safety (showing the referral had a good experience)

## 4. Added a profile badge: "Top Contributor"

For users who referred 5+ people.

Reputation + Motivation (social recognition)

Referral rate went from 5% to 24%.

Same product. Same customers. Different Refer signposts.

## The Refer Diagnostic

When people aren't referring, ask yourself:

### Do they have a simple story to tell?

If your value proposition is complex, they can't explain it.

### Have you created a trigger moment?

If you wait for them to remember to refer, it won't happen.

### Does recommending make them look good?

If there's any risk to their reputation, they won't do it.

**Have you shown appreciation?** If referrals feel taken for granted, they'll stop coming.

## The Refer Principle

People advocate when they're so confident in the experience that recommending it feels like helping, not risking.

Not "they like it enough."

Not "they're satisfied."

They're *confident* that bringing someone else in will reflect well on them and benefit the other person.

That confidence only comes from sustained positive experience (Adopt) plus specific Refer signposts that make advocacy easy, safe, and rewarding.

When Refer unlocks, customers become a growth engine.

But you have to design for it. It doesn't happen by accident.

## PART TWO: The Path To Yes

### Chapter 6: Designing The Path To Yes

Most people approach influence reactively. They pitch something and hope it works. If it doesn't, they try again, maybe with different words, maybe with more enthusiasm, maybe with more detail.

But they're still hoping. Still guessing. Understanding the four unlocks changes that. Influence stops being something you hope for. It becomes something you design.

This chapter shows you how.

#### The Shift from Hoping to Designing

Here's what most people do when someone hesitates:

- Try a different explanation
- Add more reasons
- Talk faster
- Get more passionate
- Give up

Here's what changes when you understand the unlocks:

- Diagnose which unlock they're facing
- Identify which need isn't satisfied
- Create a signpost for that specific need
- Check if the intended takeaway formed
- Refine until yes unlocks

It's not mysterious anymore. It's a process.

#### The Four Questions

When someone isn't moving forward, you ask four questions:

##### 1. Which unlock are they facing?

Are they deciding whether to try, buy, adopt, or refer? Most mistakes happen here. You think they're evaluating whether to buy, but they're actually stuck at try. You show them value and ROI when they need clarity and safety.

How to tell:

- Haven't taken any action yet? → Try
- Taken action but not committed resources? → Buy
- Committed but not using it regularly? → Adopt
- Using it but not recommending it? → Refer

## 2. Which need isn't satisfied?

Each unlock has specific. Which one is missing? Listen to what they say. Watch what they do. Their hesitation tells you exactly what's missing.

Examples:

- "I'm not sure this is for someone like me" → Problem-Solution Fit (Buy)
- "Sounds complicated" → Effort need (Try)
- "I keep forgetting to use it" → Routine Fit (Adopt)
- "I wouldn't know how to explain it" → Story need (Refer)

## 3. What signpost would satisfy that need?

Once you know the need, you can design the signpost.

Need: Effort (Try)

Signpost: "Setup takes less than three minutes"

Intended takeaway: "The first step is simple"

Need: Value (Buy)

Signpost: "Teams reduce rework by 40%"

Intended takeaway: "This is worth it"

The signpost must directly address the specific need for the specific unlock.

## 4. Did it work?

After showing the signpost, check: what takeaway actually formed? You can't read minds, but you can observe signals:

- What do they say?
- What do they ask?
- Do they move forward or stay still?
- What's their tone and body language?

If the actual takeaway matches the intended takeaway, the unlock happens. If it doesn't match, you refine.

## A Complete Example: Jessica's Proposal

Let me show you what this looks like in practice. Jessica is a product manager. She wants to propose a new feature to her engineering team.

### Round 1: First Attempt

Jessica spends 15 minutes explaining why customers need this feature. She shows customer quotes, usage data, competitive analysis. Response from the team: Polite nods. "Interesting." No commitment.

#### Diagnosis:

Which unlock?

**Buy** (not Try—they understand what the feature is; they're deciding whether to commit resources)

Which need isn't satisfied?

**Value to them:** Jessica showed customer value. But engineers don't care about customer value the same way product managers do. They care about: Will this make my life better or worse?

Value need: not satisfied from the engineer's perspective.

### Round 2: Adjusted Approach

Jessica: "This feature will eliminate 80% of the bug reports you're currently handling. That's about 6 hours a week you'd get back."

Response: "Okay, but we're slammed right now."

**Diagnosis:** Progress! Value need satisfied (they see the benefit to them).

But now stuck on:

**Risk and Urgency:** "We're slammed" = "This feels like it will make things worse before it makes them better" (Risk) + "Why now?" (Urgency)

### Round 3: Final Push

Jessica: "We can build an MVP in two weeks. If it doesn't reduce bug reports by 50% in the first month, we shelve it and I won't bring it up again."

Response: "Let's spec it out."

#### Buy unlocked. What happened:

Round 1: Wrong need (customer value instead of engineer value)

Round 2: Right need (engineer value), but new needs emerged (risk, urgency)

Round 3: Satisfied remaining needs (low risk, clear urgency)

Jessica's idea didn't change. Her understanding of what signposts they needed changed.

## The Pattern

This is how designing yes works:

1. **Diagnose the unlock**
2. **Identify the missing need**
3. **Create a signpost for that need**
4. **Check the takeaway**
5. **Refine if needed**

It's iterative. You rarely get it perfect on the first try.

But every attempt gives you information. Every response tells you what's working and what's missing.

You're not guessing anymore. You're diagnosing and adjusting.

## Common Mistakes

### Mistake 1: Skipping Diagnosis

Jumping straight to "How do I convince them?" without understanding which unlock they're facing.

**Solution:** Always start with "Where are they in the journey?"

### Mistake 2: Generic Signposts

"This is great" doesn't satisfy any specific need. "You should do this" doesn't create any specific takeaway.

**Solution:** Match the signpost to the specific need for the specific unlock.

### Mistake 3: Not Checking Takeaways

Assuming your message landed the way you intended.

**Solution:** Observe what actually happens. Listen to what they say. Watch what they do.

### Mistake 4: Giving Up Too Soon

Treating "no" as final instead of information.

**Solution:** See resistance as a signal about which need isn't satisfied. Refine and try again.

## Two Ways to Check Takeaways

You can't read minds, but you can gather data.

### Method 1: Listen to their response

What do they say first? That often reveals the actual takeaway.

- "This seems complicated" = Effort need not satisfied
- "I'm not sure it's worth it" = Value need not satisfied
- "How do I know this will work?" = Trust or Risk need not satisfied

### Method 2: Ask directly

Simple, non-leading questions:

- "What's your main concern at this point?"
- "What would need to be true for you to move forward?"
- "What's unclear?"

Their answers tell you exactly what signpost is missing.

## The Mindset Shift

**Old way of thinking: Influence is about being persuasive.**

- "How do I convince them?"
- "What's my best argument?"
- "Why aren't they getting it?"

**New way of thinking: Influence is about being precise.**

- "Which unlock are they facing?"
- "Which need hasn't been satisfied?"
- "What signpost would create the takeaway they need?"

You're not trying to convince anyone. You're trying to show them what they need to see to feel ready for the next step.

When you understand what that is, you can design it.

When you design it, yes becomes natural instead of forced.

## The Two-Question Method

Here's a simple way to check what takeaways your signposts are creating. Show someone your message, could be a landing page, an email, a pitch, whatever.

Then ask two questions:

**1. "What were you thinking when you saw this?"**

This reveals the actual takeaway. Not what you hoped they'd think. What they actually thought.

**2. "What would you change?"**

This reveals what's missing or confusing.

Don't explain. Don't defend. Don't guide them. Just listen.

Their answers tell you whether your signpost created the intended takeaway.

If it did, keep it.

If it didn't, refine it and test again.

This works for everything: customer messaging, work proposals, difficult conversations in relationships.

Show the thing. Ask the two questions. Listen.

The gap between what you intended and what they took away tells you exactly what to fix.

## **Why This Works**

When you design yes this way, three things change:

**1. You stop blaming the other person**

"They're not getting it" becomes "I haven't shown them what they need yet."

**2. You stop repeating yourself**

Saying the same thing louder doesn't help. Showing a different signpost that addresses the actual missing need does.

**3. You stop feeling helpless**

Influence isn't a mystery. It's not about charisma or luck. It's about understanding the unlock, identifying the need, and creating the signpost.

You have control over what you show. You have control over how you refine it. You have control over the process.

## The Design Principle

Influence isn't about being more persuasive. It's about being more precise.

When you know:

- Which unlock someone is facing
- Which need isn't satisfied
- What signpost would satisfy it
- Whether the takeaway formed

You can guide people to yes with clarity and integrity. You're not manipulating. You're not tricking. You're not pressuring.

You're showing them what they need to see to make the decision that's right for them.

That's what it means to design yes.

## **PART THREE: When Yes Gets Stuck**

### **Chapter 7: When Customers Get Stuck**

Every business depends on customers moving through all four unlocks. But most businesses lose customers at predictable points along the journey, and they don't know why.

This chapter shows you exactly where customers get stuck, what's missing when they do, and how to fix it. Each section follows a real company through a specific unlock problem.

#### **The Try-Stuck Company: Marcus's Conversion Problem**

Marcus ran a project management SaaS tool. His product was good—genuinely useful, well-designed, and fairly priced. But something was badly wrong with his numbers.

Every month, 50,000 people visited his website. Only 800 signed up for the free trial. That's a 1.6% conversion rate. The industry benchmark for SaaS trial signups was between 8% and 10%.

Marcus had tried everything he could think of:

- Rewrote the homepage copy three times
- Added customer testimonials
- Created a demo video
- Offered social proof ("Join 10,000+ teams")
- A/B tested different call-to-action buttons

Nothing moved the needle.

#### **The Diagnosis**

Marcus was stuck at the Try unlock, but he didn't understand why. People were visiting his site, that meant they had some interest. But they weren't taking the first step.

When he started watching session recordings of visitor behavior, he saw a pattern. People would land on the homepage, scroll for about thirty seconds, and leave. No signup. No click to learn more. Just... gone.

He ran exit surveys asking: "Why didn't you sign up?" The most common responses were:

- "Not sure what this does"
- "Seems complicated"
- "I'd have to think about it"

These responses told him everything. The Try unlock wasn't happening because the essential takeaways weren't forming. Let's look at what was actually on his homepage:

### Homepage Before:

Headline: *"The Future of Project Management"*

Subheadline: *"Leverage AI-powered workflows to optimize team productivity"*

Call to action: *"Start Your Free Trial"*

Three feature boxes:

- Smart Automation
- Integrated Analytics
- Scalable Architecture

### What Was Wrong

Marcus was showing signposts that satisfied HIS needs (to show off the product's capabilities) rather than signposts that satisfied the visitor's Try needs.

Let's map what was missing:

**Awareness need:** "I see what this is"

- The headline "The Future of Project Management" doesn't tell you what the product actually does
- Visitors couldn't form the takeaway "I understand what I'm looking at"

**Problem need:** "This solves something that matters to me"

- No mention of a specific problem
- Visitors couldn't form the takeaway "This addresses my pain"

**Solution need:** "I get how this works"

- "AI-powered workflows" and "Scalable Architecture" are abstract
- Visitors couldn't form the takeaway "I understand how this would help me"

**Effort need:** "This won't take much work"

- "AI-powered" and "Scalable Architecture" imply complexity
- The unintended takeaway was "This sounds complicated"

Marcus was pitching Buy-level benefits (optimization, analytics, scalability) to people who hadn't even unlocked Try yet.

## The Fix

Marcus rebuilt the homepage with only one goal: satisfy the Try needs. Nothing else mattered until people were willing to take the first step.

### Homepage After:

Headline: *"Never miss another deadline"*

Subheadline: *"One place for your team's tasks, deadlines, and progress"*

30-second video: Screen recording showing exactly what the interface looks like in action

Call to action: *"See it work (no signup needed)"*

Three customer quotes in simple language:

- "We used to lose track of who was doing what. Now everyone knows."
- "Setup took ten minutes. We were running projects the same day."
- "Finally, something that doesn't require a training manual."

## What Changed

Now every Try need had a corresponding signpost:

**Awareness:** "One place for your team's tasks, deadlines, and progress"

- Takeaway formed: "I understand what this is"

**Problem:** "Never miss another deadline"

- Takeaway formed: "This solves a problem I have"

**Solution:** 30-second video showing the actual interface

- Takeaway formed: "I see how this works"

**Safety:** "See it work (no signup needed)"

- Takeaway formed: "I can look without risk"

**Effort:** Customer quote: "Setup took ten minutes"

- Takeaway formed: "This won't take much work"

## The Results

In the first month after the change:

- Trial signups went from 800 to 4,600
- Conversion rate went from 1.6% to 9.2%

- Same product. Same price. Different signposts.

The Try unlock opened because the right takeaways could finally form.

### **The Lesson**

Try fails when people can't quickly answer three questions:

1. What is this?
2. Why does it matter to me?
3. Can I try it easily?

If any of those takeaways don't form, the Try unlock stays closed no matter how good your product is.

### **The Buy-Stuck Company: Aisha's Trial-to-Paid Problem**

Aisha's company had the opposite problem. Their Try unlock was working beautifully.

They offered a 14-day free trial with excellent onboarding. 78% of trial users were "active"—meaning they logged in multiple times and actually used the product. That's exceptional engagement.

But only 4% converted to paid customers.

People were trying the product. They were using it. But they weren't buying it.

### **The Diagnosis**

Aisha started calling churned trial users and asking them directly: "You seemed to like the product during the trial. What happened?"

The responses were remarkably consistent:

- "I liked it, but wasn't sure it was worth \$99 a month"
- "Didn't see enough difference from the free tools we use"
- "Wasn't sure it would keep working long-term for us"
- "Seemed good but not... essential?"

These weren't objections to the product. They were signs that specific Buy needs weren't being satisfied. Let's translate what they were really saying:

**Quote:** "Wasn't sure it was worth \$99 per month."

**Takeaway:** The ROI was not clear in their terms.

**Unsatisfied Need:** Value

**Quote:** “Didn’t see enough difference from free tools.”

**Takeaway:** They did not see why this specifically solved their problem better.

**Unsatisfied Need:** Problem Solution

**Quote:** “Wasn’t sure it would keep working long term.”

**Takeaway:** They were not confident in the long-term value.

**Unsatisfied Need:** Risk

**Quote:** “Seemed good but not essential.”

**Takeaway:** There was no compelling reason to buy now instead of later.

**Unsatisfied Need:** Urgency

### What Was Missing

During the trial, users experienced the PRODUCT but not the VALUE. They could complete tasks and see the interface work, but they never formed the takeaway "This is worth paying for."

Aisha realized that the trial was completely passive. Users signed up, got access, and were left alone for 14 days. No signposts appeared during that window to help them understand the value they were getting.

The trial showed them what the product COULD do but never showed them what it WAS doing for them specifically.

### The Fix

Aisha redesigned the trial experience to actively create the takeaways needed for Buy:

**Day 2 email:** *"You've already saved 45 minutes compared to your old workflow"*

This created a Value takeaway by making the ROI concrete and immediate.

**In-app dashboard:** Running counter showing:

- Time saved this week
- Tasks completed faster
- Deadlines hit that would have been missed

This continuously reinforced the Value takeaway with real numbers.

**Day 7 email:** Case study from a similar company: *"A 12-person marketing team like yours cut their weekly planning time from 4 hours to 45 minutes; that's 3.25 hours saved every week, or 169 hours per year."*

This satisfied the Problem-Solution need ("works for someone like me") and provided concrete Value evidence.

**Day 10 comparison:** *"Here's what you'd lose if you go back to [competitor/old way]:"*

- List of specific workflows that would break
- Calculations of time that would be lost
- Features they'd have to give up

This created the Preference takeaway and increased perceived switching cost.

**Day 12 risk reversal:** *"Not sure yet? We'll extend your trial 7 more days. And if you subscribe and it's not working after 60 days, we'll refund you completely and help you migrate back."*

This satisfied the Risk need.

## **The Results**

Trial-to-paid conversion went from 4% to 16% in three months. Same product. Same pricing. The only change was adding signposts during the trial that created the takeaways needed for Buy.

## **The Lesson**

Buy fails when value stays theoretical. People need to SEE and FEEL the value during the trial, not just imagine it. Every Buy need must be actively satisfied with specific signposts, or the unlock won't happen.

## **The Adopt-Stuck Company: Chen's Churn Problem**

Chen's team management software had good Try and Buy numbers. People signed up. People converted to paid. But then they disappeared.

His retention curve looked like this:

- Month 1: 89% retained
- Month 3: 34% retained
- Month 6: 12% retained

This is catastrophic. It meant that for every 100 customers who paid, only 12 were still using the product six months later.

## The Diagnosis

Chen segmented his users into two groups: those who were still active at six months versus those who had churned. Then he interviewed people from both groups.

**Active users** all had a similar pattern:

- They created custom templates in week one
- They invited their team in week two
- The tool became part of their daily standup routine
- They had integrated it into Slack or their email
- They'd experienced early wins (finding a lost task, hitting a deadline)

**Churned users** had a completely different pattern:

- They set up the tool
- Used it a few times
- Then "forgot about it" or "went back to email"
- Never integrated it into their actual workflow
- Couldn't remember the last time they logged in

The pattern was clear: Active users had unlocked Adopt. Churned users had tried and bought, but never adopted.

## What Was Missing

After someone converted to paid, they were on their own. Chen's company sent a welcome email and that was it. No guidance on building it into their routine. No celebration of early wins. No proactive support when friction appeared.

The Adopt needs weren't being satisfied:

**Routine:** Never helped users integrate it into daily rhythms

**Value Realization need:** Users couldn't see concrete benefits in their terms

**Care need:** No proactive support when they got stuck

**Progression need:** No sense of forward movement or improvement

## The Fix

Chen built an adoption engine focused entirely on satisfying Adopt needs:

Week 1: Build the routine, celebrate the first win

Guided setup flow:

- "Let's create your first template together"
- "When will your team check this? Morning standup? End of day?"
- Prompt to set up Slack integration: "Get updates where you already work"

This created the Routine takeaway by explicitly building the habit.

After first completed task: *"You completed your first project 2 days faster than your team average!"*

This created the Value Realization takeaway with immediate evidence.

#### Week 2: Expand the routine

Prompt: *"Invite your team"*

Pre-written message templates they could send Onboarding flow for new team members

This reinforced the Routine by expanding integration.

#### Week 3: Proactive support

If no activity for 3 days, automatic email: *"Stuck? Here's the most common issue people hit at this stage and how to fix it in 2 minutes."*

This satisfied the Care need before frustration built.

#### Ongoing: Make value visible

Weekly summary email: *"Your team completed 47 tasks this week, 23% faster than before using [tool]"*

Dashboard showing:

- Cumulative time saved
- Deadlines hit vs. missed
- Team velocity trends

This continuously reinforced Value Realization with concrete numbers.

### The Results

After implementing the adoption engine:

- Month 3 retention: 34% → 67%
- Month 6 retention: 12% → 51%

Same product. Different adoption signposts creating different takeaways.

## The Lesson

Adopt fails in the gap between commitment and habit. People don't adopt products because the product is good. They adopt because specific signposts help them integrate it into their life, see early value, and feel supported when friction appears.

You must actively guide adoption. It never happens automatically.

## The Refer-Stuck Company: Priya's Growth Plateau

Priya's design tool had reached an impressive milestone: highly loyal users who loved the product.

Her Net Promoter Score was 72, very high. User interviews were glowing. People said things like "I couldn't work without this" and "This changed how our team operates."

But organic growth had plateaued. Very few new users were coming from referrals. Less than 3% of users had referred anyone.

## The Diagnosis

Priya started asking her most enthusiastic users directly:

"Would you recommend this to colleagues?"

Everyone said: "Absolutely!"

Then she asked: "Have you recommended it to anyone?"

Most answered: "Uh... I don't think so?"

She followed up: "Why not?"

The responses revealed which Refer needs weren't being satisfied:

Quote: "Never really thought about it."

Takeaway: There was no trigger moment prompting them to share.

Unsatisfied Need: Motivation

Quote: "Not sure who to tell."

Takeaway: They had no clear sense of who it was for or how to explain it.

Unsatisfied Need: Story

Quote: "Would feel weird just bringing it up."

Takeaway: They were unsure whether referring would make them look good.

Unsatisfied Need: Reputation

Quote: “What if they do not like it as much as I do?”

Takeaway: They were worried the referral might backfire.

Unsatisfied Need: Safety

### What Was Missing

Priya had built an excellent product and created happy users. But she had never built signposts that created the takeaways needed for Refer.

Users loved the product in isolation, but had:

- No natural moment to think "I should share this"
- No easy story to tell about what it does
- No confidence that referrals would reflect well on them
- No sense that the company would treat their referrals well

Referrals weren't happening because none of the Refer needs had signposts creating the necessary takeaways.

### The Fix

Priya redesigned several touchpoints to actively create Refer takeaways:

Created natural referral moments:

Added "Share this design" button prominently on finished work.

When clicked, it generated: *"I made this with [Tool]—makes design way easier. Here's a template you can try."*

This gave users:

- A trigger moment (finishing something they're proud of)
- An easy Story (one sentence + example)
- A low-risk way to refer (sharing the work, not pitching a product)

Added motivation:

Message when sharing: *"Your colleague will get a free template pack—and so will you"*

This satisfied the Motivation need with reciprocal value.

Provided social proof of good experience:

When referral signed up, automatic email to referrer: *"Thanks for the intro! [Name] is loving the template and has already created their first design."*

This satisfied the Safety need (proof the experience was good) and Appreciation need (acknowledgment of the referral).

Created visible status:

Profile badge system:

- "Contributor" badge for 3+ referrals
- "Top Contributor" badge for 10+ referrals
- Shown on public portfolio profiles

This satisfied the Reputation need—referring made them look good in their professional community.

Made the story memorable:

Created simple one-liner users could share: *"It's like Canva, but it actually works with your brand system"*

Paired with real examples: *"Our team went from 2 hours per social post to 15 minutes"*

This satisfied the Story need with language anyone could repeat.

## The Results

Referral rate went from 3% to 24% within six months.

But the bigger insight was about QUALITY: Referred users had 40% higher lifetime value than users who found the product through other channels. They came in with trust already built and a clear mental model of what the tool did.

## The Lesson

Refer fails when it's left to chance. Happy customers don't automatically become advocates. They need:

- A trigger moment that reminds them to share
- An easy story to tell
- Confidence that referring will make them look good
- Evidence that referrals will be treated well
- Motivation to overcome inertia

Every one of these is a Refer need that requires specific signposts to create the necessary takeaway.

## The Pattern Across All Four

These four companies each had one unlock stuck. But the pattern was identical in every case:

1. Customers weren't moving forward
2. Not because they were uninterested or difficult
3. But because specific takeaways weren't forming
4. Because the signposts creating those takeaways were missing

Once the right signposts appeared, the takeaways formed, and the unlock opened.

This is true at every stage:

- **Try:** People need clarity, safety, and low effort
- **Buy:** People need value, trust, and manageable risk
- **Adopt:** People need integration, visible value, and support
- **Refer:** People need triggers, stories, and confidence

The diagnostic question is always the same:

**"Which unlock is stuck, and which takeaways aren't forming?"**

When you can answer that question, you know exactly what signposts to create.

## Chapter 8: When Colleagues Won't Buy In

The four unlocks don't just apply to customers. They apply everywhere people make decisions—including at work.

Every important work outcome depends on someone saying yes:

- A coworker agreeing to collaborate
- A manager approving your idea
- A team adopting a new process
- A colleague advocating for you

But most people approach workplace influence backward. They try to convince, persuade, and push. And they wonder why smart ideas keep dying in meetings.

This chapter shows you how to apply the unlock framework to work. You'll see where colleagues get stuck, which takeaways are missing, and how to guide them forward.

### The Idea That Kept Dying: Jordan's Quarterly Struggle

Jordan was a senior individual contributor at a tech company. Every quarter, he proposed process improvements to his manager. And every quarter, the same thing happened:

His manager would listen politely, ask a few questions, say "interesting," and then... nothing.

After eighteen months of this pattern, Jordan stopped trying. He concluded his manager either didn't care about improvement or didn't trust his judgment.

But that wasn't the problem.

### The Real Problem

Jordan was satisfying HIS needs (to explain his thinking) but not his manager's needs (to justify committing resources).

Here's what a typical conversation looked like:

**Jordan:** "I think we should implement automated testing for the checkout flow."

**Manager:** "Why?"

**Jordan:** "It would catch bugs earlier and make our code more reliable."

**Manager:** "Interesting. Let me think about it." [Never mentioned again]

Jordan assumed his manager was dismissing the idea. Actually, his manager was stuck at the Buy unlock. He couldn't commit resources without satisfying specific Buy needs, and Jordan never showed him the signposts that would create those takeaways.

### What Takeaways Were Missing

Let's map Jordan's pitch to the Buy needs:

**Value need:** Jordan said "more reliable" but never quantified the ROI

- His manager couldn't form the takeaway "The value justifies the cost"

**Problem-Solution need:** Jordan explained what automated testing IS, not what problem it specifically solves for their team

- No takeaway formed about relevance

**Risk need:** Jordan never addressed how much time it would take to implement

- No takeaway formed about feasibility

**Urgency need:** No reason given for why this matters NOW

- The takeaway formed was "We can think about this later"

Jordan was technically correct that automated testing would help. But being correct doesn't unlock Buy. Satisfying Buy needs does.

### The Fix

Jordan learned to structure his proposals around his manager's Buy needs, not his own explanation needs.

Here's the same conversation, redesigned:

**Jordan:** "The checkout flow breaks in production about twice a month."

**Manager:** "Yeah, it's frustrating."

**Jordan:** "Each incident costs us roughly 4 hours of dev time to debug and fix. That's 8 hours a month, or 96 hours a year. Basically 2.5 weeks of engineering time spent on bugs that could be caught earlier."

*(Value need satisfied: Concrete ROI in terms manager cares about, engineering time)*

**Manager:** "That's... a lot."

**Jordan:** "I can build automated testing that catches these before production. Would take about 3 days of my time upfront."

*(Risk need satisfied: Low investment, high return; feasibility clear)*

**Manager:** "Why haven't we done this already?"

**Jordan:** "We could have. But the next major feature ships in 3 weeks. If we wait till after that, we'll have more code to test and higher risk of breakage during the rush."

*(Urgency need satisfied: Cost of waiting is explicit)*

**Manager:** "Let's do it now."

### What Changed

Not Jordan's idea. Not his manager's personality. Just the signposts that created the necessary Buy takeaways.

The first conversation satisfied Jordan's need to be heard. The second conversation satisfied his manager's needs to commit resources wisely.

That's the difference between explaining and unlocking.

### The Lesson

When your ideas die in meetings, the problem usually isn't that your colleagues don't understand. It's that they're stuck at an unlock you haven't addressed.

Before pitching:

1. **Diagnose which unlock they're facing** (Try? Buy? Adopt?)
2. **Identify which needs aren't satisfied**
3. **Create signposts that produce those specific takeaways**

### The Peer Who Wouldn't Collaborate: Maya's Cross-Functional Problem

Maya worked in Marketing and needed data from the Analytics team. She had asked Sam, the Analytics lead, four times for the same report.

Every time, Sam said: "Yeah, I can probably do that."

Every time: Nothing happened.

Maya started to think Sam was either too busy, didn't care about Marketing's needs, or was being passive-aggressive.

None of those were true. Sam was stuck at Try.

## The Diagnosis

Here's what Maya's original request sounded like:

*"Hey Sam, can you pull some conversion data for the Q4 campaign? Would really help us optimize."*

From Sam's perspective, this request was:

- Vague scope (which conversion data? how much?)
- Unknown time investment (10 minutes or 10 hours?)
- Unclear outcome (optimize how?)
- Potentially opening the door to more requests

All of Sam's Try needs were unsatisfied:

**Effort need:** No indication of how much time this requires

- Takeaway: "This might be a big project"

**Outcome need:** "Help us optimize" is vague

- Takeaway: "Not sure why this matters"

**Safety need:** Feels open-ended, might lead to more requests

- Takeaway: "This could turn into a bigger commitment"

Sam wasn't refusing. He just couldn't unlock Try because the necessary takeaways weren't forming.

## The Fix

Maya rewrote her request to explicitly satisfy Sam's Try needs:

*"Hey Sam, I need one specific thing: conversion rate by traffic source for our October campaign. It's in the dashboard you already built, so it should be a quick export. This will tell us whether to double down on paid search or shift budget to organic. Can you grab it by Friday?"*

Let's map how this creates the necessary takeaways:

**Effort need satisfied:** "Quick export from existing dashboard" (not a research project)

- Takeaway: "This is easy"

**Outcome need satisfied:** Specific decision it enables ("double down or shift budget")

- Takeaway: "I see why this matters"

**Safety need satisfied:** Bounded request (one specific metric, clear deadline)

- Takeaway: "This isn't open-ended"

**Timing need satisfied:** "By Friday" (clear deadline)

- Takeaway: "I know exactly what's expected"

Sam's response: "Oh yeah, that's easy. Give me 10 minutes."

### What Changed

The request became small enough and clear enough that trying felt easier than continuing to avoid it.

Maya stopped asking Sam to commit to something vague and instead made the first step concrete, safe, and valuable.

### The Lesson

When peers won't collaborate, they're often not refusing—they're stuck at Try because your request feels too risky, unclear, or open-ended.

Make Try easy:

- Be specific about what you need
- Show it's low-effort
- Explain the outcome clearly
- Make it feel bounded, not open-ended

## The Team That Wouldn't Adopt: Carlos's Workflow Nightmare

Carlos led a twelve-person team. After getting executive approval, he introduced a new project management system to replace their email-and-Slack chaos.

He trained everyone. He sent documentation. He added it to team meeting agendas.

Three months later: two people were using it consistently. Everyone else had reverted to email. Carlos was frustrated. "They agreed to this!" he said. "Why won't they just use it?"

### The Problem

Carlos had achieved Buy unlock—the team agreed to try the system. But he treated Buy as the finish line. Buy just opens the door. The real challenge is Adopt.

### What Was Missing

Carlos provided:

- Initial training (helps with Try)
- Documentation (helps with Buy)

Carlos didn't provide:

- Routine integration support
- Early win celebrations
- Ongoing encouragement
- Response to friction

All the Adopt needs went unsatisfied:

**Routine need:** People didn't know how to integrate it into their day. Takeaway: "I'll get to it when I have time" (which never comes)

**Value Realization need:** No visible evidence of benefit. Takeaway: "Not sure this is actually better"

**Care need:** When people hit friction, no one helped. Takeaway: "I'm on my own with this"

**Reliability need:** System wasn't consistently used by enough people to be reliable. Takeaway: "Can't trust that others are checking this"

Without these takeaways, Adopt couldn't unlock.

## The Fix

Carlos built an adoption support system:

### Week 1: Build the routine

"Let's spend the first 5 minutes of standup updating the board together."

This created a shared routine, not an individual burden. The Routine takeaway formed through repetition.

### Week 2: Celebrate early wins

"Look—we closed 8 tickets this week and everyone knew what everyone was working on. First time that's happened."

This created the Value Realization takeaway with concrete evidence.

### Week 3-4: Provide immediate support

When someone struggled, Carlos helped immediately. He didn't wait for them to ask.

This created the Care takeaway: "Someone has my back."

### **Month 2: Make ongoing value visible**

"Remember when we lost track of that client deliverable? Hasn't happened once since we started using this."

Connected the system to pain it prevented. Reinforced Value Realization.

### **Month 3: Let them feel the alternative**

Someone suggested going back to email for a week to "see if it's really better."

Carlos said: "Great idea. Let's try it."

The team lasted three days before asking to go back to the system. Too many things were slipping through cracks. The coordination overhead was immediately obvious.

The Preference takeaway formed through contrast: staying is better than switching.

### **The Results**

By month four, eleven of twelve people were using the system consistently.

The system itself never changed. The adoption signposts did.

### **The Lesson**

At work, getting agreement isn't the goal. Building the habit is the goal.

Adopt requires ongoing signposts, not one-time buy-in:

- Build it into routine (don't make it extra work)
- Celebrate early wins (make value visible)
- Provide immediate support (show you care)
- Let them feel the contrast (switching back is worse)

### **The Promotion That Never Came: Lena's Advocacy Gap**

Lena was a high performer. She consistently exceeded expectations. Her manager praised her work regularly. But when promotion time came, she was passed over.

The feedback: "You're doing great work, but..." The "but" was always the same: no one at the leadership level was advocating for her strongly enough.

Lena had unlocked Try (got hired), Buy (got the role), and Adopt (doing excellent work). But she hadn't unlocked Refer, her manager wasn't advocating for her.

## The Problem

For her manager to advocate for Lena to senior leadership, specific Refer needs had to be satisfied. They weren't.

**Reputation need:** Lena did good work on her immediate projects, but she hadn't done anything visible to senior leadership. Her manager couldn't form the takeaway "Promoting Lena makes me look smart"

**Story need:** Lena's manager knew she was good but didn't have specific, memorable examples. No clear narrative to tell in the promotion discussion

**Safety need:** Lena hadn't demonstrated readiness for the next level. Her manager couldn't form the takeaway "She's definitely ready"

**What Lena Was Doing:** Executing her current role well. Hitting deadlines. Being reliable. This satisfies Adopt. It doesn't create Refer.

**What Lena Wasn't Doing:** Making her impact visible beyond her immediate work. Giving her manager a clear story to tell. Demonstrating senior-level skills before being promoted.

## The Fix

Lena started creating Refer signposts:

### **Making the Story easy (Story need):**

Started sending her manager monthly updates: *"Here's what I shipped this month, here's the measurable impact"*

Example: *"Feature I built increased conversion by 12%" "Process improvement saved the team 8 hours per week"*

Now her manager could say in promotion discussions: "Lena drove a 12% conversion increase" (specific, memorable, impressive).

### **Making advocacy look good (Reputation need):**

Took on a high-visibility project (with her manager's support): Led a cross-functional initiative that senior leadership was watching.

Delivered it successfully. Now her manager looked good for having her on the team.

### **Reducing advocacy risk (Safety need):**

Demonstrated senior-level skills before being promoted:

- Mentored two junior teammates

- Led a technical initiative across teams
- Communicated updates to senior stakeholders directly

Showed she could already operate at the next level, reducing the risk of recommending her.

### The Results

Next promotion cycle: Her manager advocated strongly. Lena was promoted.

Her work quality hadn't changed—it was already excellent. What changed was her manager's ability to advocate for her effectively.

### The Lesson

At work, doing good work unlocks Adopt. Getting promoted requires Refer.

You need advocates, and advocates need:

- A clear, compelling story they can tell about you
- Evidence that vouching for you makes them look good
- Confidence that you're ready for what comes next

Make it easy for people to advocate for you. That means creating signposts that help them form the necessary Refer takeaways.

### The Workplace Pattern

Most workplace frustration comes from unlock confusion:

You think you need: Better ideas

You actually need: Buy signposts (Value, Risk, Urgency)

You think you need: Approval

You actually need: Adopt signposts (Routine, Support, Value Realization)

You think you need: To work harder

You actually need: Refer signposts (Story, Reputation, Safety)

The diagnostic question: **What unlock is actually stuck?**

Once you know that, you know which signposts to create.

## Chapter 9: When Relationships Stall

The four unlocks apply to every relationship in your life: friendships, family, romantic partnerships, and the daily connections that shape your experience.

People move closer when the right takeaways form. They pull back or drift away when those takeaways don't form. Understanding which unlock someone is facing—and which needs aren't satisfied—changes how you navigate every relationship.

This chapter shows you how the unlock framework reveals what's actually happening when relationships stall, and what you can do about it.

### The Conversation That Never Happened: Alex and Morgan

Alex and Morgan had been together for three years. Recently, Alex had been feeling disconnected. Not angry. Not ready to leave. Just... distant.

He wanted to talk about it. But every time he tried, Morgan shut down.

Alex started to think: "She doesn't care" or "She doesn't want to deal with this."

That wasn't true. Morgan did care. But she was stuck at the Try unlock for this conversation.

#### The Failed Attempts

##### Attempt 1:

**Alex:** "We need to talk about us."

**Morgan:** [Tenses up] "What's wrong?"

**Alex:** "I've been feeling disconnected lately."

**Morgan:** "I don't want to fight."

[Conversation ends]

##### What went wrong:

"We need to talk" triggered alarm bells. The Safety need was violated immediately.

Morgan's takeaway: "This is going to be painful and confrontational." She couldn't unlock Try because trying felt threatening.

##### Attempt 2:

**Alex:** "I feel like we don't spend quality time together anymore."

**Morgan:** "We're together all the time."

**Alex:** "But we're not really connecting."

**Morgan:** [Defensive] "I'm doing my best."

[Conversation derails]

**What went wrong:** This sounded like blame. It created shame, not safety. Morgan's takeaway: "You're saying I'm not enough." Still stuck at Try. The Safety need remained unsatisfied.

### The Fix

Alex realized Morgan needed Try signposts before the real conversation could happen. Specifically, she needed:

**Safety need:** "This is safe to engage with" **Outcome need:** "I understand what this conversation is for" **Effort need:** "This won't be overwhelming"

He tried again with those needs in mind:

### Attempt 3:

**Alex:** "Hey, I want to share something that's been on my mind. You don't need to fix anything or respond right away—I just want you to hear it. Is now an okay time?"

#### What this did:

"You do not need to fix anything."

**Takeaway:** I am not being asked to solve or defend.

**Satisfied Need:** Safety

"Just want you to hear it."

**Takeaway:** This is not a big production.

**Satisfied Need:** Effort

"Is now okay?"

**Takeaway:** I have control over when this happens.

**Satisfied Need:** Timing

**Morgan:** "Okay..."

**Alex:** "I've been feeling like we're going through the motions lately—still doing everything together but not really connecting. It's not about you doing something wrong. I think we both just got busy. I want to find ways to feel close again."

**What this did:**

“Not about you doing something wrong.”

**Takeaway:** Safety is being reinforced.

**Satisfied Need:** Safety

“I think we both just got busy.”

**Takeaway:** The problem is framed as shared rather than placing blame.

**Satisfied Need:** Understanding

“Want to find ways to feel close again.”

**Takeaway:** The purpose is clear and aligned with a positive outcome.

**Satisfied Need:** Outcome

**Morgan:** [Pause] "I've kind of felt that too, actually."

[Real conversation begins]

**What Unlocked It**

Not better words. The right signposts for Morgan's Try needs.

Alex stopped trying to have the Buy-level conversation (deep emotional processing) and instead created the conditions for Try (safe initial opening).

Once Try unlocked, Buy became possible.

**The Lesson**

When someone you care about won't engage in an important conversation, they're usually not refusing. They're stuck at Try because the conversation doesn't feel safe, clear, or manageable.

Before having the hard conversation, create the Try unlock:

- Remove pressure and blame
- Make the outcome clear
- Give them control
- Show it's safe to begin

## The Friendship That Faded: Jordan and Sam

Jordan and Sam were close friends in college. After graduation, they stayed in touch via text. Over two years, the texts got less frequent. Jordan would suggest hanging out. Sam always said "Yeah, let's do it!" But they never actually met up.

Eventually Jordan stopped trying. He assumed Sam didn't value the friendship anymore. That wasn't true. Sam was stuck at Try.

### The Pattern That Failed

**Jordan:** "We should grab coffee sometime!"

**Sam:** "Definitely!" [Nothing happens]

Sam agreed in theory, but couldn't unlock Try in practice.

What went wrong: "Sometime" is too vague. It satisfies zero Try needs:

**Awareness need:** "Coffee sometime" is not concrete. No clear takeaway forms

**Timing need:** No specific time. Takeaway: "I'll get to this later" (which never comes)

**Effort need:** Feels like it requires planning,. Takeaway: "I need to figure out my schedule first"

### The Fix

Jordan made Try concrete and easy:

**Jordan:** "You free next Saturday at 2pm? There's a coffee shop near you, Bluebird on Main. Just 30 minutes, no big thing. Want to catch up."

**What this did:**

"You free next Saturday at 2 pm?"

**Takeaway:** The exact day and time make the timing need satisfied.

**Satisfied Need:** Timing

"There's a coffee shop near you, Bluebird on Main."

**Takeaway:** A specific place and activity make the awareness need satisfied.

**Satisfied Need:** Awareness

"Just 30 minutes, no big thing."

**Takeaway:** The commitment is small and clearly bounded, so the effort need is satisfied.

**Satisfied Need:** Effort

“Want to catch up.”

**Takeaway:** The purpose is simple and clear, so the outcome need is satisfied.

**Satisfied Need:** Outcome

**Sam:** "Yes! Let's do it."

They met. The friendship rekindled.

### What Changed

Jordan stopped asking Sam to commit to rebuilding their entire friendship (Buy-level ask) and instead made the first step tiny and concrete (Try-level ask). The lower the barrier, the more likely the Try unlock.

### The Lesson

When reconnecting with people, don't ask them to unlock Buy ("invest in rebuilding this relationship"). Ask them to unlock Try ("spend 30 minutes together").

Make it:

- Specific (when, where, what)
- Short (lower the commitment)
- Easy (remove friction)

### The Relationship Pattern

In relationships, unlock confusion shows up as:

**You want:** Deep conversation (Buy-level intimacy)

**They need:** Safe small talk first (Try-level trust)

**You want:** Commitment (Buy)

**They need:** Consistent positive experience (Adopt)

**You want:** Them to advocate for you (Refer)

**They need:** To see you're reliable first (Adopt)

The diagnostic question: **What unlock are they actually facing, regardless of what unlock you want from them?**

Meet them where they are. Then the unlock you want becomes possible.

## **PART FOUR: Creating T-BAR Content**

### **Chapter 10: Applying The Needs You Understand**

You have come a long way. You understand the unlocks. You understand the needs. You understand why content works when it works. You can see how each stage depends on satisfying the right need at the right time.

Now it is time to turn that understanding into something real. Here is the simplest way to see how much you have actually learned. Open a blank page.

Try writing a landing page headline for your product. Or an outreach message. Or a follow-up note. Or a referral request. Or a conversation opener for someone at work or at home. Anything that requires you to use the needs you just learned.

You think this will take a few minutes. It does not.

You type a sentence that sounded perfect in your head. On the page, it looks flat. You delete it. You try again. Worse. Delete. You try something clever. It sounds forced. You try something clear. It sounds boring. The ideas feel solid in your mind, but your fingers write something entirely different.

You start thinking:

- “Did I misunderstand the needs?”
- “Is this the right unlock?”
- “Why does this sound nothing like what I intended?”

This is the moment everyone hits. It feels uncomfortable. That is normal. It is also useful.

Understanding the needs is strategy. Writing is craft. They overlap, but they are not the same skill. When you write your first piece of content, you drift into familiar patterns. You try to explain too much. You try to justify too early. You start in your world instead of theirs. You throw in details that feel important but do nothing for the reader. You know what the person needs, but your words do not match it yet.

This is the gap between theory and practice. You cannot think your way through it. You have to write your way through it.

#### **Why Writing Is Harder Than Understanding**

Writing exposes your assumptions. It shows the places where you are still fuzzy. It reveals how easily you slip into persuasion or feature dumping. Even when you know the needs, your brain reaches for shortcuts, habits, and phrases you have used for years.

This is why the next four chapters matter. You will see the whole messy process play out for each unlock.

## **What Happens Next**

In the next four chapters, you will go through this same experience with a single example. You are not the founder of Outbox, but you will use Outbox as your practice ground. You will start confident. You will hit the wall. You will fix it. You will see the pattern.

Each unlock has its own struggle.

Try feels scattered until you understand how to start in the reader's world.

Buy feels shaky until you learn how to speak to value and risk without overselling.

Adopt seems simple until you realize how easy it is to overwhelm a new user.

Refer feels awkward until you understand how to reduce social risk.

Working through these examples teaches you judgment. Not tricks. Not templates.

Judgment. The kind of judgment that lets you diagnose needs and shape content with clarity.

And once you have that judgment, you are ready for the next step.

## **Where AI Comes In**

AI only becomes useful once you know what needs to be said. You already did the hard part. You know the unlocks. You know the needs. You know what makes content work. Now AI can help you turn that judgment into channel ready content without doing all the heavy lifting by hand.

AI will not replace your thinking. It scales it. It handles the formatting, channel rules, structure, and expert techniques. You handle the needs and unlocks. Together, it works.

## **Moving Forward**

Turn the page. It is time to write your first real piece of content.

## Chapter 11: Your First Attempt At TRY Is Usually Messy

You understand the needs. Great. Now it is time to turn them into something real. This chapter shows you what happens the first time you try to write Try content by hand. You are not the founder of Outbox, but you are doing the exercise so you can learn how the pattern works.

You open your laptop and sit down to write the Try content for Outbox. You feel good. You think this will take a few minutes. You type a line that sounded perfect in your head. On the screen, it looks flat. You delete it. You try a different angle. Worse. You delete that too. The confidence drains faster than you expected.

You start wondering if you misunderstood the needs, which is funny because you felt so sure about them ten minutes ago.

This moment feels uncomfortable. That is normal. In fact, this is the moment when you first understand the gap between knowing the needs and writing content that satisfies them.

### Where Things Start to Go Wrong

The first instinct most people have when writing Try content is to talk about the product. You know you should focus on the reader's world, but your fingers immediately start typing features, claims, and clever sentences that sound impressive in your head but land with a dull thud on the page.

You write something like:

“Outbox is an AI powered communication tool that improves team performance and message quality by giving your team advanced insights and real time suggestions.”

It looks normal enough. It is also useless. It does not satisfy a single Try need. It does not start in the reader's world. It does not show relevance. It does not feel simple. It tries too hard. It speaks too soon about your solution. It skips the person's actual situation. It skips their goal. It asks them to care before giving them a reason to.

This is the most common first draft in the world. Everyone writes this version. You are in good company.

### Returning to the Try Needs

Try is about one thing. You are helping the reader decide whether to keep paying attention. That is it. They are not here to evaluate or compare. They are just deciding whether this is worth another few seconds.

The Try needs are simple:

- Relevance
- Clarity
- Simplicity
- Curiosity
- A low pressure next step

Once you remember that, the content becomes clearer.

You start again, but this time you begin in their world.

“Most teams are sending more outreach than ever, but fewer messages are getting replies.”

Now you are describing something real. Something the reader already knows. Something that matches their lived experience.

You keep going.

“You want your team to write messages that start real conversations, not more noise.”

This connects the situation to the goal they care about. No hype. No jargon. No over explaining.

Only now do you hint at the new approach.

“There is a way to help your team write stronger messages without adding work to their day.”

You are still not pitching. You are simply creating curiosity. That is the job of Try.

And then you invite them to look.

“Here is a short page that shows how it works.”

Try content is not a sales pitch. It is a permission slip for the reader to keep reading.

## **Building the Try Landing Page**

The landing page expands on the same logic. You do not switch unlocks. You stay in Try.

You might write something like:

**Your team is sending more messages than ever. Fewer are getting replies.**

This is their world again.

**You can help every representative write messages that start real conversations.**

This is their goal.

Then you introduce Outbox in a simple, grounded way.

“Outbox shows your team what to say and how to say it. It gives guidance based on what has worked across thousands of conversations.”

You add one tiny example to make it concrete.

“It can suggest clearer openings, stronger subject lines, and better ways to address concerns.”

Then you end with a next step they can take without commitment.

“Take a quick look. No signup required.”

This is Try content that satisfies the Try needs.

## **Why This Still Feels Hard**

Even after fixing the message, you may not feel confident. You may still wonder:

- “Would an expert phrase this differently?”
- “Is this too simple?”
- “Am I missing something important?”

This is normal. Writing Try content is difficult because you are balancing:

- your understanding of the needs
- your assumptions about the reader
- your instincts about tone
- your guesses about what matters most

It gets easier with practice, but the first few attempts always feel wobbly.

## **What You Should Notice**

You have not written channel ready Try content. The outreach message you wrote would need to look different for email, LinkedIn, SMS, ads, or a video script. Each channel has its own structure and expectations.

You do not need to know any of that yet. Chapter 15 will handle it.

For now, the point is that you learned how to take needs and turn them into content that satisfies those needs. You felt the struggle. You learned the pattern. You corrected the mistakes you did not know you were making.

You are ready to move to the next unlock, where the doubts are different but the pattern is the same.

When you are ready, turn the page. The next chapter is Buy.

## Chapter 12: You Second Guess Every BUY Line

You think Buy will be easier because you know the value of your product. You believe you can explain it clearly. You sit down to write the Buy content for Outbox feeling more confident than you did with Try. Then you start typing, and a different kind of uncertainty settles in.

Buy is where someone decides whether to move forward. You know this. You know their needs. You know they are asking themselves whether this is worth their time, money, and attention. But as soon as you try to put your thoughts into words, everything gets slippery.

You type your first attempt.

“Outbox will transform your sales team by increasing reply rates and optimizing communication across your entire funnel.”

You look at it. It feels vague. It could be about any product in the world. You delete it.

You try again.

“Outbox uses advanced AI to analyze messages and provide real time suggestions.”

Now it is just a feature dump. There is no connection to what the buyer actually cares about. Delete.

You take a breath and try a third version.

“Outbox has helped many teams see massive improvements in message quality and team efficiency.”

This is pure hype. No buyer believes this without context. Delete.

You notice a pattern. Every attempt fails in a different way. One is too vague. One is too technical. One is too promotional. You try to fix one problem and create another.

You stare at the screen and feel a quiet frustration you did not expect. You keep rewriting the same sentences. Each version feels wrong in a different way. You can almost feel the buyer’s doubts in your own head. It is like arguing with yourself.

Welcome to Buy content.

### Why Buy Feels So Uncertain

Buy is not about excitement. Buy is about confidence.

The person is trying to answer questions like:

- “Will this work for me?”
- “Do I trust this?”
- “Is this worth it?”
- “Will this be a hassle?”
- “What if it does not help?”

These are not small questions. They are emotional and practical at the same time. The Buy needs reflect that.

Buy requires:

- clarity
- confidence
- believable value
- reduced risk
- clear fit
- a next step that feels safe

Once you remember this, the writing becomes clearer.

## **Returning to the Buy Needs**

You start again. This time, you write for one person with one goal.

They want more replies without burning out their team.

So you write:

“You want your team to start more conversations without adding more pressure to their day.”

This is simple and true. It meets the reader in their world. It frames the outcome they want.

Now you explain the value without exaggeration.

“Outbox helps representatives write clearer, stronger messages in less time. It gives guidance that has been proven to increase reply rates, even for teams that already have experience.”

This is tangible. It is not hype. It gives the reader a believable reason to keep reading.

You add one concrete detail to make the value feel real.

“Most teams see their first improvement in the first week.”

Small detail. Big credibility.

Then you address risk.

“You do not have to change your workflow. Outbox works inside the tools you already use. You are not replacing anything. You are upgrading what your team already does.”

Buy is full of hidden fears. This line reassures them.

Now you explain fit.

“Your team writes messages the same way they do now. Outbox simply shows up with guidance when they need it.”

This gives the buyer a mental picture of using the product.

Then you justify the cost.

“Even a small increase in replies covers the cost. For most teams, two or three extra conversations a month pays for the entire product.”

A simple, believable justification. No spreadsheets required.

Finally, you offer a safe next step.

“If you want to see how this would work for your team, here is a quick link to walk through it.”

This is Buy content that satisfies the Buy needs. Clear. Calm. Grounded. Helpful.

## **Why It Still Feels Uncertain**

Even after doing everything right, Buy content always feels a bit wobbly. You might wonder:

- “Is this too simple?”
- “Should I add more proof?”
- “Does this sound confident enough?”
- “Does this address the real risks?”

This is the nature of Buy. You are dealing with someone’s confidence. You are dealing with their sense of risk. Those things are emotional. They are rarely resolved in one sentence.

The work you just did is the work. Buy always feels uncertain. That is part of the job.

## What You Should Notice

Just like Try, this message is not channel ready. It might work as a follow up email, but it would need different formatting as:

- a pricing page
- a pitch script
- a sales deck
- a product overview
- a messaging guide

You do not need to master those formats here. That is what the AI chapter is for.

For now, you have done the important part. You took vague, hype-driven, and feature-heavy drafts and turned them into Buy content that satisfies the needs. You felt the friction. You fixed the message. You learned the pattern.

Now you are ready for Adopt. It has its own struggles and its own version of the same uncertainty.

Turn the page when you are ready.

## Chapter 13: You Think ADOPT Is Simple, Then It Isn't

You figure that once someone says yes, the hard part is over. Now you just need to help them get started. You assume Adopt will be easy because the person already wants the outcome. All you have to do is show them how to use the product. Simple.

You open a blank page to write the first onboarding message for Outbox. You type a friendly greeting. You add a quick thank you. You mention a few features so they know what is possible. You attach a link or two, just in case. You read it back and feel uneasy.

It looks something like this:

“Welcome to Outbox. Here are five things you can try to improve your messaging workflow.

1. Check out the suggestions panel.
2. Review the coaching dashboard.
3. Try rewriting a few messages.
4. Explore the templates section.
5. Invite a teammate.”

You stare at it. You know there is too much here. It feels like homework. It gives the user five first steps, which is the same as giving them none at all. You try trimming it, but then it feels too empty. You try adding more explanation, but that makes everything heavier. Every version feels wrong in a different way.

You start wondering if onboarding is supposed to feel this confusing.

Welcome to Adopt.

### Why Onboarding Feels Harder Than It Looks

Adopt is the moment someone tries the product for the first time. They said yes, but they are still unsure. They want value, but they do not want to work for it. They want clarity, but their mental model of the product is incomplete. They want support, but they do not want to feel overwhelmed.

Here is the truth that makes Adopt difficult:

**Adopt is not about teaching. Adopt is about progress.**

If you try to teach too much, you lose them.

If you explain too little, you confuse them.

If you give too many options, they freeze.

If you give too few, they feel lost.

The Adopt needs reflect this tension. People need:

- a clear first step
- early evidence that the product works
- reassurance that they can succeed
- support that does not overwhelm
- a sense of forward movement

Your messy draft did none of that. It was a list of features, wrapped in polite enthusiasm, hoping the user would figure out where to begin.

So you take a breath and start again, but this time from the needs.

## **Returning to the Adopt Needs**

You begin with their goal, not your product.

“Thanks for getting started with Outbox. You want your team to start more conversations without adding more work to their day.”

This reminds them why they are here and reconnects them to their motivation.

Then you give them one clear action. Not five. Not three. One.

“A great way to begin is to send your next message using Outbox suggestions.”

This is specific, concrete, and immediately doable.

Now you explain why this step matters.

“This shows you how Outbox guides your writing without changing your voice. It also gives you an early win so you can feel the improvement.”

A single early win creates more confidence than any onboarding video ever could.

Then you make the action even easier.

“To help you do this quickly, we added a short guide inside your account. It takes less than two minutes to follow.”

No overwhelm. No ambiguity.

Then you show what progress looks like.

“Once you send one message, Outbox will adjust suggestions based on your tone and situation. You will see how it helps in real conversations.”

This gives them a picture of success.

Finally, you point to the next optional step without pressure.

“After that, you can explore the coaching section to see how your messages improve over time. Outbox will guide you.”

This is Adopt content that satisfies the needs. It creates momentum without volume. It supports without overwhelming. It gives the user confidence at the exact moment their uncertainty is highest.

## Why It Still Feels Delicate

Even when you get Adopt right, it always feels delicate. You might worry:

- “Is this step too small?”
- “Should I explain more?”
- “Will the user know what to do next?”
- “Am I leaving something important out?”

These questions are normal. They come from your impulse to teach and your fear of being too simple. But Adopt content is not about covering everything. It is about giving the user a clear first step that shows value.

Once they experience that, the next step becomes obvious.

## What You Should Notice

This version of Adopt content is not channel ready. As with the other unlocks, it will need different forms depending on where it appears:

- onboarding email
- in product tooltip
- first run checklist
- customer success script
- dashboard prompt

You do not need to learn every format. The AI chapter will handle the heavy lifting.

For now, you have done the real work. You took a cluttered, overwhelming onboarding message and turned it into one clear step that satisfies the Adopt needs. You felt the uncertainty, fixed the mistakes, and learned the pattern.

Adopt always feels delicate. That is normal. When you understand the needs, the path becomes simple.

You are ready for Refer.

## Chapter 14: Asking For REFER Always Feels Awkward

You have happy users. They are seeing value. Now you want referrals. It feels like the natural next step. So you pull up a blank page to write a referral ask for Outbox. You expect this to be quick. After all, the person is already using the product. Then you start typing.

“We would really appreciate it if you could refer Outbox to your friends and colleagues.”

You read it back. You cringe a little. It sounds needy. You can imagine yourself receiving this message and ignoring it. You try again, hoping this version lands better.

“Do you know anyone else who could benefit from Outbox?”

This one is not much better. It is polite, but vague. It does not give the reader anyone specific to think of. You try one more time.

“We rely on referrals, so if you could spread the word, that would be great.”

Now it sounds desperate. You close your laptop for a moment. You did not expect this chapter to be the one that gets under your skin, but here you are.

Welcome to Refer content.

### Why Referral Content Feels So Strange

The awkwardness comes from the same place every time. You are not asking for money anymore. You are asking for reputation. The person has to vouch for you. That requires:

- trust
- confidence
- identity alignment
- social risk
- clarity on who would benefit

You cannot solve these things by asking nicely. You cannot solve them by sounding grateful. And you definitely cannot solve them by pushing harder.

Yet that is what most referral messages do. They feel like:

- “Do us a favor.”
- “Help us out.”
- “Spread the word.”

None of this works because none of it satisfies the Refer needs.

So you stop guessing and return to the needs.

## Returning to the Refer Needs

Refer is about:

- helping the person feel proud, not pressured
- reminding them why the product fits them
- making the referral about helping someone else
- reducing the social risk
- giving them a simple, safe way to refer

You start again, but this time you begin with something true.

“You have been using Outbox consistently, and your team’s messages have clearly improved.”

This reminds them why they are a good fit. It is recognition, not flattery.

Then you help them picture someone specific.

“If you know someone who is facing the same challenge your team used to face, a quick introduction could really help them.”

The referral becomes about the other person, not about you.

Then you lower the effort.

“You do not need to explain anything. You can just connect us and we will share the same short overview you saw.”

Then you lower the social risk with an alternative.

“Here is a short link you can pass along if you prefer to send it yourself.”

Finally, you close with sincerity.

“Thanks again for being part of Outbox.”

This is Refer content. It does not feel needy. It feels natural. You can imagine yourself sending it. You can imagine the reader thinking of someone who might benefit.

## Why This Still Feels Delicate

Even when you get the needs right, Refer messages always feel a little fragile. You might wonder:

- “Is this too forward?”
- “What if they do not know anyone?”
- “What if they think I am assuming too much?”

These doubts are normal. A referral ask is a social moment. Not everyone will act on it. That is okay. Your job is not to convince everyone to refer. Your job is to make it easy for the people who already want to.

Once you see it that way, the message becomes much simpler.

## **What You Should Notice**

Just like the previous unlocks, this message is not channel ready. A referral ask might appear:

- in a customer success call
- in a dashboard prompt
- in an email
- as a short script
- in a product notification

Each format needs tweaks. Each channel changes the pacing and presentation. You do not need to master any of that here.

You did the important part. You took three awkward, ineffective drafts and turned them into a referral message that satisfies the Refer needs. You felt the discomfort. You corrected the mistakes. You saw the pattern again.

Now you have reached the point where doing all of this by hand starts to feel slow and uncertain. This is exactly where the next chapter comes in.

You have seen the messy version and the clean version. Now you are ready to scale this without doing all the work yourself.

Turn the page. The next chapter shows you how.

## Chapter 15: AI Gives You The Experts You Wish You Had

You know the feeling by now. Every unlock starts simple and then gets messy. You eventually get there, but it takes work. You have written Try, Buy, Adopt, and Refer content by hand. You have felt the confusion. You have seen how much judgment is required. And you have probably wondered how long it would take to do this across all your content.

You are capable of doing it. That is not the issue. The issue is that doing it by hand is slow, and you never feel completely sure how an expert would phrase something. You can sense there is a better version out there, but you do not know what it looks like.

This is where AI becomes useful.

Not as a writing machine.

As a thinking partner.

AI can write, but that is not the part you need. The useful part is that AI can think like an expert if you ask it the right questions. With the right prompts, AI can behave like a strategist, a channel specialist, a communication coach, and even your customer. You already did the hard work of learning the needs. Now you can use AI to scale that judgment across real channels.

### Why AI Works Here

When you write content manually, you are trying to imitate experts you have never met. You are guessing at channel rules. You are borrowing tone from places you are not sure about. You are trying to create content that satisfies needs while matching the structure of a format you barely understand.

It is no wonder writing feels heavy.

The prompts you are about to use solve that. They do not replace your thinking. They scale it. If you try to use them without understanding the needs, the outputs will look polished but will not work. But now that you understand the needs, the prompts become a shortcut to high quality, channel ready content.

Each prompt has a job. Together, they give you a team of experts working on your behalf.

Here is how it fits together:

Prompt 1 chooses the two best channels for your product using a real expert's playbook.

Prompt 2 identifies the top experts for those channels and extracts the rules they follow.

Prompt 3 uses those experts to turn your T-BAR messages into channel native content.

Prompt 4 refines the content using the two question method with multiple perspectives.

That is the system. You keep the judgment. AI does the heavy lifting.

### **Before You Use the Prompts**

Prompt 1 asks you to describe your product, your business model, and your target customer. You can do that in one of two ways.

#### **Option 1:**

Create a Business Blueprint and a Customer Profile using Appendix E and Appendix F. If you have those files ready, you can attach them directly to the prompt. This gives the AI the fullest understanding of your product and customer and produces the highest quality output.

#### **Option 2:**

Write short descriptions directly into the blanks in the prompt. This works fine too. It is simply less detailed.

Choose whichever option matches where you are. The important thing is that you provide clear inputs. You bring the understanding. The prompts scale it.

Below are the prompts, exactly as written. Before each one you will see a short explanation of its purpose so you know how to use it without changing a word.

## PROMPT 1

“Act as a research assistant. I will describe my product, my target customer, and my business model. Your job is to identify:

1. One real, verifiable expert (living or historical) with deep experience growing or marketing businesses like mine
2. A summary of the expert’s background, achievements, and what they are best known for
3. The two channels this expert would select as the highest leverage channels for reaching my target customer, based entirely on this expert’s proven playbooks and real world strategies
4. A clear explanation of why this expert would choose those two channels for my exact product and market
5. The principles this expert consistently focuses on when creating effective go to market strategies

My product and business model:

[Write a short description here or attach your Business Blueprint file]

My target customer:

[Write a short description here or attach your Customer Profile file]”

## PROMPT 2

“For the first recommended channel from the previous output, complete the following steps in order:

1. Identify the top real expert (living or historical) with publicly verifiable success creating highly effective content for this channel
2. Summarize their background, achievements, and what they are known for in this channel
3. Describe the channel specific formatting requirements for creating high performing content on this channel (length, structure, hook patterns, pacing, layout, visuals, calls to action, interaction patterns)
4. Describe the stylistic norms this expert prioritizes (tone, rhythm, voice, personality, level of detail, emotional or logical balance)
5. List the most common mistakes creators make on this channel, according to this expert’s documented experience

After completing all steps above for the first channel, repeat the exact same process for the second recommended channel from the previous output.

Show the output for Channel 1 and Channel 2 separately.”

## PROMPT 3

“Now adopt the combined perspectives of:

1. The real business type expert identified in Prompt 1
2. The top channel expert for Channel 1
3. The top channel expert for Channel 2
4. Jeremy Miner applying NEPQ principles

Below are my T-BAR messages for the [Try / Buy / Adopt / Refer] stage. Each message corresponds to the needs for that stage.

**[Paste your T-BAR messages here]**

Your tasks:

### A. Create Channel 1 Content

- The channel expert for Channel 1 must lead the creation of the content
- The business type expert must influence strategic positioning, market fit, and relevance
- Jeremy Miner must shape the emotional flow, question based structure, buyer psychology, and alignment with NEPQ principles
- Map each T-BAR need into the correct structural position for high performing content on Channel 1
- Follow all formatting rules, style, pacing, tone, length constraints, layout patterns, hook structures, and interaction requirements identified for Channel 1 in Prompt 2
- Produce content that is fully native to Channel 1 and reflects the documented real world approach of the channel expert
- Preserve every T-BAR need in the final version  
Label the output clearly as “Channel 1 Content.”

### B. Create Channel 2 Content

- The channel expert for Channel 2 must lead the creation of the content
- The business type expert must influence strategic positioning, market fit, and relevance
- Jeremy Miner must shape the emotional flow, question based structure, buyer psychology, and alignment with NEPQ principles
- Map each T-BAR need into the correct structural position for high performing content on Channel 2
- Follow all formatting rules, style, pacing, tone, length constraints, layout patterns, hook structures, and interaction requirements identified for Channel 2 in Prompt 2
- Produce content that is fully native to Channel 2 and reflects the documented real world approach of the channel expert
- Preserve every T-BAR need in the final version  
Label the output clearly as “Channel 2 Content.”

Create two fully distinct outputs, one for each channel, each driven by its channel expert and influenced by the business expert and Jeremy Miner.”

## PROMPT 4

**Purpose:** Refine the content using the two question method with multiple expert perspectives.

“Now evaluate the content created in Prompt 3 using the two question method. Apply the method separately for each persona:

Personas:

1. The real business type expert
2. The real channel expert for Channel 1
3. The real channel expert for Channel 2
4. Jeremy Miner using NEPQ principles
5. The ideal target customer

For each persona:

1. Automatically choose the single most effective modifier (skeptical, rushed, deep expert, contrarian, cautious, results driven, overwhelmed, emotionally driven, etc.) that will produce the most useful and honest feedback
2. Apply the two question method exactly as written:

Two question method:

“What would a [modifier] [persona] be thinking when they read this?”

“What would they change?”

Show each persona’s feedback separately and clearly labeled.

After showing all persona feedback:

1. Combine all recommended changes into one refined version of the content
2. Explain briefly how each persona’s feedback influenced the refinement
3. Show the final improved content labeled “Refined Version.””

## **What You Should Notice**

These prompts do not write content for you. They give you something you could never get alone. They give you multiple expert viewpoints applied directly to your situation. You get a strategist's perspective, two channel specialists, a psychology expert, and your actual customer all reviewing your work.

This is what it feels like to have experts on your side.

And it works because you already did the hard part. You learned the needs. You wrote content by hand. You learned how to judge whether a message satisfies the unlock. Without that foundation, the prompts would produce output that looks polished but does not move anyone forward.

With that foundation, the prompts become a force multiplier.

## **What Happens Next**

Use the prompts. Review the outputs. Fix what does not satisfy the needs. Do it again. You will get faster each time. You now have a system that turns your judgment into channel ready content without requiring you to learn every channel's quirks or every expert's style.

You understand the unlocks.

You know how to satisfy the needs.

You know how to evaluate content.

Now you have tools that scale your ability.

This is the end of Part Four. The rest is practice.

## **PART FIVE: Using T-BAR Every Day**

### **Chapter 16: How to Use T-BAR Everywhere**

By now you understand the unlocks. You understand the needs. You have written content by hand. You have seen where things fall apart and how to fix them. You know how AI fits into the process.

Now you get a simpler, more useful idea.

You can use T-BAR everywhere.

You do not have to remember everything. You only need to recognize what someone needs in the moment. Once you see the unlocks, you stop guessing. You stop persuading. You stop explaining things no one asked for. Conversations get easier because you can tell what the other person needs, even when they do not say it directly.

This is the moment where T-BAR stops being a framework and starts becoming instinct.

#### **The Shift: From “Using T-BAR” to Thinking in Unlocks**

There is a point where you hear unlocks automatically. You hear uncertainty that signals Try. You hear hesitation that signals Buy. You hear overwhelm that signals Adopt. You hear distance that signals Refer is not earned yet.

This shows up in normal conversations, not in diagrams. Once you notice unlocks, you cannot un-notice them. And once you see what someone needs, you start responding differently.

#### **What This Looks Like in Real Life**

Here are a few places where T-BAR shows up before you even think about it.

##### **Emailing your manager**

Before T-BAR: long explanations.

After T-BAR: you see they are in Try, so you write one clear point. They reply faster.

##### **Giving feedback**

Before T-BAR: everything gets mixed together.

After T-BAR: you identify one need and say one sentence that satisfies it.

##### **Pitching an idea**

Before T-BAR: you push the idea.

After T-BAR: you start by showing relevance. People listen.

## **Handling conflict**

Before T-BAR: you argue positions.

After T-BAR: you see the unsatisfied need and speak to that. The tension drops.

## **Everyday life example**

Someone you care about is upset. Before T-BAR, you guess what to say. After T-BAR, you can hear whether they need clarity, reassurance, or space. You respond to the need, not the emotion on the surface.

These moments are small, but they add up. You go from talking at people to helping them move forward.

## **How to Use T-BAR in Real-Time Conversations**

You do not need a checklist. You need one short mantra.

Unlock. Need. Sentence.

Then ask yourself three questions that fit into a single breath.

What unlock is stuck?

What need is missing?

What simple sentence satisfies it?

Say that sentence.

Stop talking.

See what happens.

You will not do this perfectly. You do not need to. You only need to stay curious about what the other person needs. If they hesitate again, repeat the same three questions.

This is practical mastery. Nothing complicated.

## **Where People Go Wrong**

Using T-BAR casually is simple, but a few mistakes show up almost everywhere.

### **Trying to satisfy multiple needs at once**

This confuses people.

### **Over-explaining**

More words make things worse.

### **Jumping unlocks**

You talk Buy when they are in Try, or you teach Adopt before they are ready.

### **Assuming they understood you**

The words landed. The takeaway did not.

### **Sliding back into persuasion**

Persuasion is louder. T-BAR is cleaner. When you satisfy the need, persuasion is unnecessary.

These mistakes are normal. You fix them by noticing when a conversation feels stuck and asking, “Which need did I skip?”

## **The Fast Process: Five Seconds of T-BAR Thinking**

Most communication problems can be solved with a quick internal reset.

“What unlock is stuck?”

“What need is missing?”

“What sentence satisfies it?”

Five seconds.

No special training.

No templates.

This habit is what makes T-BAR feel natural instead of mechanical.

## **How This Sets Up the Rest of Part Five**

Now that you can use T-BAR everywhere, you are ready for the next layer: troubleshooting. Sometimes you satisfy the needs and things are still stuck. Sometimes multiple needs collide. Sometimes the situation is emotional or messy.

That is where your judgment develops.

Turn the page when you are ready.

## Chapter 17: Troubleshooting and Judgment

Sometimes you do everything right and the situation still gets stuck. It feels like T-BAR stopped working. It did not. You just need better diagnosis.

Everyone misdiagnoses an unlock sometimes. Everyone. It does not mean you misunderstood the framework. It means you are human and the situation is messy. That is why judgment matters.

Judgment is the part of T-BAR that helps you understand what is really going on when the first answer does not work. This chapter gives you simple ways to reset, diagnose, and move forward again.

T-BAR never fails, but your diagnosis sometimes will. Here is how to fix that.

### When You Cannot Tell Which Unlock Is Stuck

Sometimes the conversation feels foggy. You cannot see the unlock. The person is uncertain. Their signals are mixed. When that happens, listen for three things.

#### 1. Their questions

Questions tell you the decision they are trying to make.

“What is this?” signals Try.

“Why this?” signals Buy.

“How do I start?” signals Adopt.

“Who else uses this?” signals Refer is not earned yet.

#### 2. Their language patterns

Emotions map to unlocks.

Confusion sounds like Try.

Hesitation sounds like Buy.

Overwhelm sounds like Adopt.

Distance sounds like Refer.

#### 3. What they repeat

The thing they say twice is the unsatisfied need.

If they keep repeating, “I just want to be sure this won’t take too much time,” you are in Buy and the risk need is unsatisfied. If they keep repeating, “I’m not sure where to start,” you are in Adopt.

These signals are simple once you start listening.

## **When the Needs Are Unclear**

Sometimes you know the unlock but cannot see the exact need. Slow down and ask yourself three questions:

What does this person seem unsure about?

What would make them feel safer?

What takeaway is stopping progress?

This resets your attention. It also calms the conversation. You do not need to guess perfectly. You just need to find the next best guess.

## **When You Satisfy the Need but Things Still Feel Stuck**

Sometimes you say exactly the right thing and nothing moves. The person stays still. The hesitation does not lift. This is almost always one of five causes.

### **1. Emotional overload**

They heard you. They just cannot act yet.

### **2. Identity conflict**

Your message challenges how they see themselves.

### **3. Mismatched timing**

You are ready. They are not.

### **4. Hidden objections**

They have a doubt they do not want to say.

### **5. Too much information**

You created clarity, then buried it under details.

## **How to reset**

Cut your message in half.

Address one need only.

Validate their emotional state.

Slow the rhythm.

Give them one small next step.

Most stuck situations unlock with one of these moves.

Here is a simple emotional example.

You explain everything clearly and the person says, “I don’t know...” That hesitation tells you the risk need is unsatisfied. They understood the words but not the safety.

## **Troubleshooting Written Content**

Written content fails in predictable ways.

### **Common issues**

Wrong unlock.

Mixed needs.

No next step.

Too clever.

Too product focused.

Assumes trust that is not there.

### **Fixes**

Rewrite from the needs up.

Remove the first two paragraphs.

Make the next step simpler.

Make the reader’s world clearer.

Stop trying to impress anyone.

Say the value plainly.

These fixes solve most problems.

## **Troubleshooting Conversations**

Here are a few stuck moments and how to diagnose them.

### **When someone is defensive**

They do not feel safe.

Speak to their feeling first.

### **When someone goes quiet**

They are overwhelmed or confused.

Simplify or slow down.

### **When someone challenges you**

They are in Buy and their risk need is active.

Show how the idea works without forcing agreement.

### **When someone circles the same point**

That point is the need.

Address it directly.

### **When the signals seem mixed**

Two unlocks may be active.

Choose the earlier one. It is almost always correct.

## **How to Build Judgment Faster**

Judgment grows through small, consistent habits.

Notice unlocks in everyday conversations.

Guess needs when watching movies or listening to podcasts.

After a meeting, ask yourself which need was active.

Look at content and reverse engineer what it was trying to satisfy.

Teach T-BAR to someone else. That forces clarity.

These small habits turn the framework into intuition.

## **Bringing It All Together**

You will get stuck. Everyone does. T-BAR is simple. Humans are complex. Judgment is what bridges the gap. When you know how to troubleshoot, you stay grounded even when the conversation gets messy.

This is the moment where T-BAR becomes effortless. You are no longer following rules. You are using judgment.

Now you are ready for the final layer of Part Five: how to use AI in a way that strengthens your judgment instead of replacing it.

Turn the page when you are ready.

## Chapter 18: Humans + AI: The Right Balance

Now that you know how to use T-BAR in real conversations and how to troubleshoot when things get messy, you can start using AI in a way that strengthens your judgment instead of replacing it.

AI cannot replace your judgment. It cannot decide what someone needs. It cannot sense uncertainty. It cannot understand the emotional rhythm of a conversation. That part stays with you.

AI is not the strategy.

AI is not the diagnosis.

AI is not the communication skill.

AI is the labor.

AI is the formatting.

AI is the execution engine that follows your lead.

You handle what matters.

AI handles the work.

Here is how to combine the two in a way that makes you faster without losing clarity.

### What Humans Do Best

There are parts of communication that only humans can do. They depend on your intuition, your lived experience, and your ability to sense what is happening underneath the surface.

Humans own:

- diagnosing unlocks
- noticing emotion
- sensing doubt
- interpreting tone and timing
- recognizing when something feels off
- choosing what matters
- protecting relationships
- deciding what is safe or fair

You already do these things without thinking. T-BAR just helps you see them clearly.

Here is one simple example.

AI cannot tell when someone is holding back a concern they are afraid to say. You can. That single moment changes everything about what you say next.

This is the part that cannot be automated.

## **What AI Does Best**

AI handles the parts of communication that require effort, expertise, or repetition.

AI is good at:

- formatting content for a channel
- applying structure automatically
- imitating experts
- rewriting drafts
- generating variations
- compressing or expanding messages
- cleaning up tone
- following constraints

AI can do these things instantly. It does not get tired or distracted. It follows instructions. It works inside your judgment.

AI speeds you up. It does not think for you.

## **The Workflow That Actually Works**

Here is the practical loop used in real work. First the simple version:

Diagnose.

Draft.

Guide AI.

Refine.

Ship.

Now the expanded version:

1. Diagnose the unlock.
2. Identify the unsatisfied needs.
3. Write the smallest, roughest message by hand.
4. Use Prompt 1 to choose channels.
5. Use Prompt 2 to extract expert rules for those channels.
6. Use Prompt 3 to generate channel ready versions.

7. Use Prompt 4 to refine them with multiple expert points of view.
8. Evaluate the output using T-BAR needs.
9. Adjust anything that feels wrong.
10. Ship.

You provide the judgment.

AI provides the execution.

Together they make the work faster and easier.

## **How to Evaluate AI Outputs Using T-BAR**

Even strong AI outputs need human judgment. Here is the checklist.

Does it start in the right unlock?

Does it satisfy the needs?

Does it keep the spotlight on the reader?

Does it avoid persuasion and overclaiming?

Is the tone calm and clear?

Does the takeaway match the intention?

Is the next step simple and safe?

If the message looks polished but feels wrong, trust yourself. Your judgment is the truth. Fix the need and everything lines up again.

## **Common Mistakes When Using AI With T-BAR**

Here are the traps people fall into and how to avoid them.

### **Asking AI to “make it sound better”**

This creates fluff. Start with needs, not style.

### **Letting AI drift into persuasion**

This happens if you do not anchor the unlock. Reset it.

### **Combining unlocks**

AI tries to solve everything at once. Remind it which stage it is writing for.

### **Overwriting the message**

Short drafts turn into long explanations. Keep your human draft small.

### **Adding complexity**

Complex writing is almost always wrong writing.

### **Skipping the needs check**

AI cannot feel needs. You can.

Once you see these traps, you stop falling into them.

### **The Future: T-BAR as the Operating System for Human AI Communication**

AI will keep improving. Channels will keep multiplying. Work will get noisier.

Communication will get faster.

None of that changes the unlocks.

None of that changes the needs.

None of that changes what humans require to move forward.

T-BAR gives you a structure that will outlast any tool. It helps you guide people through decisions, uncertainty, and emotion. It gives AI something solid to anchor to.

You keep the judgment.

AI gives you scale.

The combination is powerful because it mirrors how communication actually works.

T-BAR gives you clarity.

AI gives you speed.

You now know how to use both.

If you know the need, AI can help you put it into words.

## CONCLUSION: The 48<sup>th</sup> Sales Pitch

Think back to the opening story. Sarah thought she had a product problem. She thought she needed a sharper sales pitch or a stronger argument or a more confident delivery. She thought the hesitation she kept hearing was a signal to persuade harder.

But it was never a persuasion problem.  
It was a clarity problem.

She was trying to create yes without understanding the need that made yes possible. She was talking to people who were stuck in different places and treating them as if they were all in the same place. She was trying to get to Buy before she had earned Try. She was trying to get to Adopt before anyone had seen value. She was trying to get to Refer long before trust had formed.

Once she saw where people were stuck, everything changed. Not because she learned magic words, but because she finally understood what they needed to see.

What did sales pitch 48 look like?

It was shorter.  
It was calmer.  
It was clearer.

She stopped trying to convince.  
She started trying to understand.  
She asked questions that surfaced the missing need.  
She responded only to that need instead of adding more information.  
She noticed when someone moved forward.  
She stopped when they had seen enough.

Some conversations ended quickly because the person was not ready for Try.  
Some moved into Buy because she satisfied the right need at the right time.  
A few became early customers who stayed, not because she pushed them, but because she guided them.

That was the difference. Sales pitches 1-47 were a performance. Sales pitch 48 was a conversation.

This is the shift you have made through this book. You know how to notice where yes is stuck and what need is missing. You know how to avoid guessing and how to avoid pushing. You know how to help someone move forward without convincing them.

You have also seen the practical side. You have created signposts by hand. You have seen how messy it can feel. You have felt the weight of guessing at channel rules and expert tone. You have seen how AI can step in as a thinking partner. You bring the judgment. AI brings the labor. Together, they shorten the distance between understanding the needs and creating content that speaks to them.

But the real change is not the prompts and not the templates.  
The real change is the way you see.

- You understand that people say no when the right takeaways have not formed yet.
- You understand that takeaways form only when they see the right signposts.
- You understand that signposts work only when they satisfy the need for the stage someone is in.

That pattern will not change.  
Not with new channels.  
Not with new tools.  
Not with new technology.

T-BAR is not a trick.  
It is a way of paying attention.  
It is a way of guiding someone through uncertainty with clarity and care.

You can use it at work.  
You can use it in your business.  
You can use it at home.

You can use it in any place where someone is trying to decide whether to move forward.

And if there is one thing to take with you when you close this book, it is this.

If you know the need, you know what to say.

## PART SIX: T-BAR Quick Reference

### Appendix A: The Four Unlocks

#### TRY Unlock

Someone agrees to give your idea, product, or request a chance.

| Need      | What It Means                      | Example Signpost                                                       | Sign It's Missing                                    |
|-----------|------------------------------------|------------------------------------------------------------------------|------------------------------------------------------|
| Awareness | They understand what this is.      | A headline or first sentence that shows clearly what this is.          | They ask, "What is this?" or seem confused.          |
| Problem   | They believe this matters to them. | A short example or scenario that connects to a problem they recognize. | They say, "I'm not sure why this matters."           |
| Solution  | They understand how it works.      | A simple explanation or quick demo showing the core idea in action.    | They ask many "How does this work?" questions.       |
| Safety    | It feels safe and low pressure.    | A reversible, low commitment first step.                               | They hesitate because the step feels risky or heavy. |
| Outcome   | There is value in trying.          | A brief note or example of what they might get out of the try.         | They ask, "What do I get from trying this?"          |
| Effort    | It will not take much work.        | A clear sign that the first step is tiny and quick.                    | They say, "I don't have time right now."             |
| Timing    | They can do this now.              | A step they can take immediately (like "See one example").             | They say "Maybe later" and do nothing.               |

## BUY Unlock

Someone invests time, money, reputation, or emotional energy.

| Need             | What It Means                                  | Example Signpost                                        | Sign It's Missing                                       |
|------------------|------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|
| Problem–solution | They believe this works for someone like them. | A brief case example from someone similar to them.      | They say, “I’m not sure this would work for me.”        |
| Value            | It is worth it.                                | A specific result or outcome in their terms.            | They say, “I don’t know if this is worth it.”           |
| Risk             | The downsides feel manageable.                 | A guarantee, low-risk trial, or easy exit.              | They worry about what happens if it goes wrong.         |
| Trust            | They trust the people behind it.               | Proof of past reliability, credibility, or consistency. | They ask for more proof or references.                  |
| Emotion          | It feels right.                                | A simple vision or future-state that resonates.         | They show hesitation that is not logical but emotional. |
| Path             | They know how to move forward.                 | A clear, simple next step.                              | They stall because they do not know what to do next.    |
| Urgency          | Now is better than later.                      | A concrete cost of waiting or benefit of acting now.    | They say, “Maybe next quarter.”                         |

## ADOPT Unlock:

Someone makes it part of their routine, workflow, or life.

| Need              | What It Means                     | Example Signpost                                                 | Sign It's Missing                                   |
|-------------------|-----------------------------------|------------------------------------------------------------------|-----------------------------------------------------|
| Value realization | They are experiencing real value. | A short update showing impact ("You saved 12 hours this month"). | They say, "I'm not sure this is helping."           |
| Routine           | It fits their life or workflow.   | An integration into something they already do.                   | They try it once and forget about it.               |
| Care              | They feel supported.              | A check-in, fast response, or help at the right moment.          | They hit a snag and give up.                        |
| Reliability       | They can count on it.             | Visible stability and consistency.                               | They stop using it after disruptions or bugs.       |
| Progression       | It keeps getting better.          | A small improvement or new benefit they notice.                  | Early enthusiasm fades.                             |
| Preference        | It is better than switching.      | A comparison showing why this stays the best option.             | They revert to old habits or consider alternatives. |

## REFER Unlock:

Someone is willing to put their name on you.

| Need         | What It Means                          | Example Signpost                                                      | Sign It's Missing                                      |
|--------------|----------------------------------------|-----------------------------------------------------------------------|--------------------------------------------------------|
| Reputation   | They will look good recommending this. | A note that highlights the credibility or quality they can vouch for. | They like it but never bring it up.                    |
| Safety       | It will not backfire on them.          | A guarantee their referral will be treated well.                      | They hesitate because they fear a bad experience.      |
| Story        | They can explain it easily.            | A simple one-line way to explain what it is.                          | They say, "It's hard to describe."                     |
| Care         | Their referral will be supported.      | Personal onboarding or a named contact.                               | They do not trust you with the people they care about. |
| Appreciation | Their effort will be valued.           | A thank you or signal of appreciation when they refer.                | They refer once and never again.                       |
| Motivation   | It is worth the effort.                | A clear trigger moment or small incentive.                            | They say, "I meant to share it," but never do.         |

## Appendix B: Diagnosing Failure To Unlock

Use this when something is stuck and you are not sure why.

### Step 1: Find the stuck unlock

| Question                                                                 | If Yes  | If No, check                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------------|---------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Q1 Try:</b> Have they taken any action yet?                           | Q2      | <ul style="list-style-type: none"><li>• Do they understand what this is?</li><li>• Do they see why it matters?</li><li>• Does it feel safe and easy?</li><li>• Is the first step obvious and small?</li></ul>                                                                                                 |
| <b>Q2 Buy:</b> Have they committed real time, money, reputation, energy? | Q3      | <ul style="list-style-type: none"><li>• Do they believe this works for someone like them?</li><li>• Is the value concrete in their terms?</li><li>• Is the risk acceptable or reduced?</li><li>• Do they trust you or the team behind it?</li><li>• Is there a reason to act now rather than later?</li></ul> |
| <b>Q3 Adopt:</b> Are they using it consistently?                         | Q4      | <ul style="list-style-type: none"><li>• Are they seeing real, visible value?</li><li>• Does it fit into an existing routine?</li><li>• Do they feel supported when something breaks?</li><li>• Is it reliable enough to trust?</li><li>• Do they see progress over time?</li></ul>                            |
| <b>Q4 Refer:</b> Would they recommend it to others?                      | Success | <ul style="list-style-type: none"><li>• Do they have an easy story to tell?</li><li>• Will recommending make them look good?</li><li>• Do they feel safe referring?</li><li>• Is there a natural trigger moment to share?</li><li>• Do they feel appreciated when they help?</li></ul>                        |

### What to do once you find the stuck unlock

The question table tells you where they are stuck. The checks show you which needs are not satisfied. Work only on the stage they are in and only on the needs that are missing.

Do not jump ahead. Do not try to fix everything at once. Satisfy the missing need for that stage. If nothing changes, revisit your diagnosis.

Once you know the stuck unlock, move to Step 2 to see what takeaway actually formed. That tells you exactly what to change.

## Step 2: Use the Two Questions to see what actually landed

Once you know the unlock, you still need to see what takeaway formed in their mind. Use these two questions and nothing else. Capture their words exactly.

| Question                                                          | Listen For                                                                                                                                                                                                       | Avoid                                                                                                                                                                      |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Question 1:</b><br>“What were you thinking when you saw this?” | <ul style="list-style-type: none"><li>• First impression</li><li>• Emotional reaction</li><li>• Assumptions</li><li>• Confusion</li><li>• What stood out</li></ul>                                               | <ul style="list-style-type: none"><li>• Leading them toward an answer</li><li>• Explaining or defending</li><li>• Interrupting</li><li>• Interpreting on the fly</li></ul> |
| <b>Question 2:</b><br>“What would you change?”                    | <ul style="list-style-type: none"><li>• What they wanted but did not see</li><li>• What confused them</li><li>• What felt like too much</li><li>• What order felt off</li><li>• What they would remove</li></ul> | <ul style="list-style-type: none"><li>• Arguing</li><li>• Justifying your choices</li><li>• Brushing off suggestions</li><li>• Getting defensive</li></ul>                 |

### What to do with the answers

1. **Look for patterns**

If three or more people say the same thing, treat it as real.

2. **Map their answers to needs**

Which Try, Buy, Adopt, or Refer needs are not satisfied?

3. **Change the signposts**

Adjust the message, example, or proof to create the takeaway you wanted.

4. **Test again**

Show the new version. Ask the same two questions. Repeat until their takeaways match your intent.

The gap between what you meant and what they received is where yes gets stuck.

## Appendix C: Common Unlock Failures and Fixes

| TRY Failure                                     | Missing Need          | Fix                                                                                                                                                                                      |
|-------------------------------------------------|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| “Looks interesting, I will check it out later.” | Timing or effort      | <ul style="list-style-type: none"> <li>• Make the first step immediate and tiny.</li> <li>• Offer a very small, no friction example to try now.</li> </ul>                               |
| “I am not sure what this is.”                   | Awareness or solution | <ul style="list-style-type: none"> <li>• Show what it does in one clear, concrete sentence.</li> <li>• Replace abstraction with a simple real example.</li> </ul>                        |
| “This seems complicated.”                       | Effort or safety      | <ul style="list-style-type: none"> <li>• Show exactly how simple it is to start.</li> <li>• Reduce risk by demonstrating ease and reversibility.</li> </ul>                              |
| BUY Failure                                     | Missing Need          | Fix                                                                                                                                                                                      |
| “I like it, but I am not sure it is worth it.”  | Value                 | <ul style="list-style-type: none"> <li>• Replace vague with outcomes that matter to them.</li> <li>• Show value using their language and their metrics.</li> </ul>                       |
| “What if it does not work?”                     | Risk or trust         | <ul style="list-style-type: none"> <li>• Reduce the risk with pilots, guarantees, or easy exits.</li> <li>• Build trust with proof from people or teams like them.</li> </ul>            |
| “Maybe next quarter.”                           | Urgency               | <ul style="list-style-type: none"> <li>• Show the real cost of waiting.</li> <li>• Contrast the impact of acting now versus later.</li> </ul>                                            |
| ADOPT Failure                                   | Missing Need          | Fix                                                                                                                                                                                      |
| “I used it once and forgot about it.”           | Routine               | <ul style="list-style-type: none"> <li>• Tie the behavior to an existing habit or workflow.</li> <li>• Surface the action where they already spend time.</li> </ul>                      |
| “I am not sure it is actually helping.”         | Value realization     | <ul style="list-style-type: none"> <li>• Make value visible with metrics, progress, or wins.</li> <li>• Highlight improvements they may not notice.</li> </ul>                           |
| “I hit a snag and gave up.”                     | Care or reliability   | <ul style="list-style-type: none"> <li>• Provide fast, proactive support when usage drops.</li> <li>• Offer short, clear fixes that restore confidence quickly.</li> </ul>               |
| REFER Failure                                   | Missing Need          | Fix                                                                                                                                                                                      |
| “I love it but have not told anyone.”           | Motivation or story   | <ul style="list-style-type: none"> <li>• Create natural trigger moments and words to share.</li> <li>• Give them a short, easy-to-repeat way to explain it.</li> </ul>                   |
| “What if they do not like it as much as I do?”  | Safety                | <ul style="list-style-type: none"> <li>• Share outcomes from referrals to show safety.</li> <li>• Guarantee a good experience for referrals with personal care or onboarding.</li> </ul> |
| “It is hard to explain what you do.”            | Story                 | <ul style="list-style-type: none"> <li>• Give a comparison such as “It is like X, but for Y.”</li> <li>• Provide one memorable before-and-after example.</li> </ul>                      |

## Appendix D: T-BAR One Page Summary

| Concept                         | Summary                                                                                                                                                                                                                                                                                                        |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>The Core Pattern</b>         | <ul style="list-style-type: none"> <li>• Signposts → Takeaways → Unlocks.</li> <li>• People say yes when the right takeaways form.</li> <li>• Takeaways form when they see the right signposts.</li> <li>• Your job is to create the signposts that lead to the takeaways that unlock the next yes.</li> </ul> |
| <b>The Four Unlocks</b>         | <ul style="list-style-type: none"> <li>• <b>Try:</b> Will I give this a chance?</li> <li>• <b>Buy:</b> Will I commit to this?</li> <li>• <b>Adopt:</b> Will I make this part of my life or work?</li> <li>• <b>Refer:</b> Will I recommend this to others?</li> </ul>                                          |
| <b>The Diagnostic Questions</b> | <ol style="list-style-type: none"> <li>1. Which unlock are they at?</li> <li>2. Which needs are unsatisfied?</li> <li>3. What signpost would satisfy that need?</li> <li>4. After they see it, what takeaway actually formed?</li> </ol>                                                                       |
| <b>The Two Questions</b>        | <ol style="list-style-type: none"> <li>1. “What were you thinking when you saw this?”</li> <li>2. “What would you change?”</li> </ol>                                                                                                                                                                          |
| <b>The Unlock Sequence</b>      | <ul style="list-style-type: none"> <li>• You cannot skip stages: Try → Buy → Adopt → Refer.</li> <li>• Meet people where they are.</li> <li>• the needs for that stage.</li> <li>• the next unlock becomes possible.</li> </ul>                                                                                |
| <b>The Integrity Check</b>      | <ul style="list-style-type: none"> <li>• Am I guiding or manipulating?</li> <li>• Am I satisfying needs they genuinely have?</li> <li>• Am I doing it with information that is accurate?</li> </ul>                                                                                                            |
| <b>Remember</b>                 | <ul style="list-style-type: none"> <li>• People say no when the right takeaways have not formed.</li> <li>• Your job is not to argue.</li> <li>• It is to show what they need to see.</li> <li>• When the signposts are right, yes comes naturally.</li> </ul>                                                 |

## Appendix E: Creating Your Business Blueprint

Your Business Blueprint is the minimum set of assumptions you need in order to create effective T-BAR content. It should be short and honest. One or two sentences per field is enough.

Use **Table A** to fill in your Blueprint.

Use **Table B** to see a completed example for the Outbox product.

Save your Blueprint file as:

**[product name] Business Blueprint v1**

**Table A: Your Business Blueprint (Fill in the Blanks)**

| Section               | Your Input                                                                                                                                                                                                 |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Problem               | <i>Describe the problem in the customer's words.</i>                                                                                                                                                       |
| Solution              | <i>Describe how the customer would explain the way your product solves their problem, in their own words.</i>                                                                                              |
| Current Alternatives  | <i>Describe how the customer would explain what they currently do instead of using your product.</i>                                                                                                       |
| Unique Differentiator | <i>Describe what the customer would say is the biggest way your approach is better than what they use today.</i>                                                                                           |
| Actors                | <i>Specify who the Users and Buyers are, or if they are the same person.</i>                                                                                                                               |
| Champion Dynamics     | <i>Describe who is most motivated to use the product or have others use it, and how that person will try to influence teammates, decision makers, or family members to adopt it and approve buying it.</i> |
| Revenue               | <i>Explain how the business is expected to make money.</i>                                                                                                                                                 |
| Key Risks             | <i>List the things that must be true for the business to work — and what would break if they turn out not to be true.</i>                                                                                  |

**Table B: Example Business Blueprint (Outbox)**

| Section               | Example                                                                                                                                                                                                                                                                      |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Problem               | “My inbox is out of control. Important emails get buried, and I spend too much time figuring out which ones need replies, tasks, or scheduling.”                                                                                                                             |
| Solution              | “It looks at my emails and sorts out what I need to do. It creates ready to approve replies, turns messages into tasks, pulls out useful information, and helps me schedule things without digging through my inbox.”                                                        |
| Current Alternatives  | “I try to scan my inbox manually, mark things unread, flag messages, create tasks by hand, or just hope I remember to come back to them.”                                                                                                                                    |
| Unique Differentiator | “It does the work for me. Instead of reading every email and deciding what it means, it turns messages into clear actions I can approve in seconds.”                                                                                                                         |
| Actors                | Users: busy professionals who manage a lot of email<br><br>Buyers: usually the same person, or occasionally a manager paying for team tools                                                                                                                                  |
| Champion Dynamics     | The person with the most overloaded inbox tries Outbox first. When they see how quickly it helps them clear important emails, they show teammates or their manager how it saves time and reduces mistakes. This creates interest across the group and makes approval easier. |
| Revenue               | Monthly subscription per user.                                                                                                                                                                                                                                               |
| Key Risks             | Users must feel the email overload strongly enough to try something new. Outbox must interpret emails accurately. Early wins must happen quickly or users will not adopt it. If email volume is too low or the value is not clear on day one, users may not subscribe.       |

## **Checklist: Is Your Business Blueprint Strong?**

A good Blueprint is:

- written in the customer's words
- short and concrete
- free of jargon
- focused on what people do today
- honest about assumptions
- clear about influence patterns
- easy to read in under one minute

A Blueprint needs improvement if:

- it sounds like a pitch
- it uses abstract language
- it lists features instead of describing how it works
- the problem statement could apply to anyone
- you included more than two sentences per row
- the differentiator is not something customers care about

If your Blueprint fails any of these checks, revise it before attaching it to Prompt 1.

## Appendix F: Creating Your Customer Profile

A Customer Profile describes one specific type of person you need to move through Try, Buy, Adopt, and Refer. Write what you can observe, not what you imagine. One or two sentences per field is enough.

Use **Table A** to create your Profile.

Use **Table B** to see a completed example for an Outbox user.

Save your Profile file as:

**[product name] Customer Profile [profile name] v1**

**Table A: Your Customer Profile (Fill in the Blanks)**

| Section            | Your Input                                                             |
|--------------------|------------------------------------------------------------------------|
| Who they are       | <i>[Describe the role or identity in simple terms]</i>                 |
| Goals              | <i>[Describe what they are trying to achieve]</i>                      |
| Frustrations       | <i>[Describe what slows them down or makes work harder]</i>            |
| Triggers           | <i>[Describe events that open them to trying something new]</i>        |
| Proof they need    | <i>[Describe what they must see to believe the solution will work]</i> |
| Objections         | <i>[List what causes hesitation]</i>                                   |
| Referral behavior  | <i>[Describe how they share wins or recommendations]</i>               |
| Environment        | <i>[Describe the context they work or live in]</i>                     |
| Decision influence | <i>[Describe who they influence and who influences them]</i>           |
| Constraints        | <i>[Describe practical limits that affect adoption]</i>                |

**Table B: Example Customer Profile (Outbox)**

| Section            | Example                                                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------|
| Who they are       | “A project manager who coordinates tasks across multiple teams.”                                      |
| Goals              | “Stay ahead of requests, avoid last minute chaos, and communicate clearly about what is happening.”   |
| Frustrations       | “Requests arrive across Slack, email, and meetings. Things get lost. People follow up constantly.”    |
| Triggers           | “A missed deadline, a request that gets lost, or a stressful week of juggling too many moving parts.” |
| Proof they need    | “A demo showing all requests automatically collected in one clean inbox.”                             |
| Objections         | “Worried it will become another tool they have to maintain manually.”                                 |
| Referral behavior  | “Shares tools in Slack when something saves them time or reduces stress.”                             |
| Environment        | “Uses Slack, Gmail, Zoom, and Asana. Constant interruptions and shifting priorities.”                 |
| Decision influence | “Influences engineers and designers. Influenced by engineering managers and product leaders.”         |
| Constraints        | “Has almost no time for setup or onboarding. Needs quick wins to stay engaged.”                       |

## **Checklist: Is Your Customer Profile Strong?**

A good Profile is:

- written like a real person
- focused on one type of customer
- concrete rather than abstract
- grounded in observable behavior
- tightly tied to Try, Buy, Adopt, and Refer
- short enough to skim in one minute

A Profile needs improvement if:

- it feels fictional or vague
- the frustrations could apply to anyone
- it includes guesses instead of observations
- it lists demographics that do not matter
- it describes five different types of customers at once
- it reads like a marketing persona instead of a real human

Revise the Profile until it feels like someone you could call today. Then attach it to Prompt 1 in Chapter 15.