

METHOD

Strategic DM for The Good News™

THE OPPORTUNITY DISCOVERY BLUEPRINT



*The Idea Behind the Modern Evolution
of Word-of-Mouth*

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This guide turns Strategic DM for The Good News™ into a repeatable practice. Use it to start relevant conversations, learn what is actually happening, and make a useful invitation only when there is a fit. The goal is not to send more messages. The goal is to make better decisions with the information a real conversation gives you.

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HOW TO USE IT Read the principles once. Then keep the message builder, conversation map, and seven-day plan nearby. Review actual conversations weekly and improve one behavior at a time.

The operating standard

Be curious, specific, and honest. Ask before advising. Reflect the person's words before interpreting them. Offer a next step only when the need, desired outcome, and your ability to help are sufficiently clear. “No fit” and “not now” are successful discoveries too.

Introduction — The Shift

From messaging problems to opportunity discovery

When outreach feels stuck, the instinct is to rewrite the opener: make it shorter, cleverer, warmer, or more persuasive. Sometimes wording is the issue. Often the deeper issue is that the sender has not yet earned a reason to contact this person. A polished message cannot repair a weak premise.

Before asking “What should I say?”, ask “What have I noticed that makes this conversation relevant to them?” That question changes the work. It moves attention from the sender’s offer to the other person’s context: a goal they have named, a transition they are navigating, a constraint they have shared, or a problem they are actively trying to solve.

Strategic DM means using direct messages as a respectful channel for discovery and connection. It is not a license to manufacture intimacy, scrape personal details, or hide a sales agenda. A strategic message is grounded in a real signal, transparent about why you are reaching out, and easy to decline.

The three outcomes of a good conversation

Outcome	What you learned	Useful next move
There is a clear fit	A problem matters now, the person wants change, and you can credibly help.	Offer a relevant next step and let them choose.
There may be a fit later	The issue is real but timing, priority, or readiness is not there.	Ask whether a low-pressure follow-up would be welcome.
There is no fit	The need is different, already handled, or outside your competence.	Say so plainly; share a resource or close the loop.

A BETTER MEASURE Count conversations that create clarity, not messages sent, replies collected, or calls booked at any cost.

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Chapter 1 — The Good News Principle

Why understanding creates opportunity

The Good News Principle is simple: a useful solution becomes good news when it meets a meaningful need at a moment the person is willing and able to address it. The same offer can feel irrelevant to one person, poorly timed to another, and valuable to someone facing the exact problem it solves.

This is why “my offer is good” is not enough. Value is experienced in context. The person has a current situation, a desired outcome, constraints, alternatives, and a sense of urgency. Understanding those conditions helps both sides decide whether a next step makes sense.

The fit equation

FIT = Relevant problem × desired change × timing × credible capability × consent to explore. If any factor is missing, slow down. A conversation may still be useful, but a sales invitation is premature.

Five pieces of context to learn

- Situation: What is happening now, in the person’s own words?
- Stakes: Why does it matter to them? What happens if it stays the same?
- Desired change: What would “better” look like, specifically?
- Constraints: What affects timing, budget, capacity, authority, or risk?
- Readiness: Are they actively exploring change, or simply describing a situation?

Do not confuse these signals

Signal	It may mean	Find out by asking
They respond quickly	Availability or interest; not necessarily buying intent.	“Would it be useful to explore options, or were you just sharing context?”
They complain about a problem	The problem may matter, or it may be a passing frustration.	“How much is this affecting your priorities right now?”
They praise your work	Trust or politeness; not proof of need.	“What part of this feels most relevant to what you’re working on?”
They ask what you do	Curiosity; an opening, not permission for a pitch.	“Happy to explain. What prompted the question?”

The right to diagnose lightly

You are not there to label, corner, or “break through” someone’s objections. Diagnose collaboratively: summarize what you heard, state the possible pattern as a hypothesis, and invite correction. Good discovery leaves the person feeling more clear and more in control, even if no purchase follows.

TRY THIS “Let me check I’ve understood. You’re trying to [desired outcome], and [constraint] is making it hard. Is that accurate, or am I missing something?”

A practical fit check: the GOOD test

Letter	Check	Question
G — Grounded	Is the need grounded in what they told you?	What words or evidence came directly from them?
O — Outcome	Is there an outcome they actually want?	What would be meaningfully better in their terms?
O — Open	Are they open to exploring a change?	Did they show or express willingness to discuss options?
D — Doable	Can you contribute within your competence?	Can you explain the scope and limits honestly?

When the same offer lands differently

Imagine a service provider who helps teams improve their client onboarding. One contact has just launched, has few clients, and wants to learn from peers. Another is seeing avoidable delays across a growing team and has asked for ways to fix them. The service has not changed; the fit has. For the first person, a useful peer resource may be the right contribution. For the second, a conversation about the workflow may be timely. The difference is the situation, not a better closing line.

Practice: separate facts from interpretation

What I observed	What I am inferring	What I need to ask
They posted that projects are running late.	They may need project management help.	“Which stage tends to create the delay?”
They are hiring their first salesperson.	They may be building a repeatable sales process.	“What are you hoping the new hire will own?”
They asked for a designer recommendation.	They may be considering a rebrand.	“What kind of project are you looking to support?”

DECISION RULE A clue earns a question. It does not earn a conclusion.

Practice lab — Recognize the fit

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. What is the observable signal?

Write only what the person directly shared or what is plainly observable.

2. What are three possible explanations?

List alternatives so your first guess does not become a fact.

3. What would the person want to change?

What question could reveal their desired outcome?

4. Apply the GOOD test

Grounded? Outcome named? Open to explore? Doable for me? Which answer is still unclear?

TAKEAWAY What will I do differently in my next conversation?

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Chapter 2 — The Modern Evolution of Word-of-Mouth

Why conversations became the new referral engine

Traditional word-of-mouth moves a name from one person to another: “Talk to Alex; they’re great.” Modern conversations can pass something more useful than a name: an understanding of the situation. When someone recognizes a challenge accurately and connects it to an appropriate resource, the introduction has context. Context makes the referral easier to evaluate and act on.

This does not replace trust or reputation. It gives trust somewhere practical to go. A person who feels understood can explain their need more clearly, decide whether help is wanted, and make a more relevant introduction to someone else.

From name passing to context passing

Basic referral	Context-rich connection
“You should talk to Morgan.”	“You mentioned the onboarding delays are costing your team time. Morgan helps teams map that workflow. Want an introduction?”
The receiver must discover why it matters.	The reason for the connection is explicit.
May create pressure or awkwardness.	Consent and relevance are checked first.
Often ends at a contact detail.	Can lead to a clear next step—or a respectful no.

The conversation loop

- Notice a signal the person chose to share.
- Ask a grounded question instead of guessing.
- Reflect the situation and check your understanding.
- Offer a relevant resource, perspective, or introduction with permission.
- Close the loop: find out whether the connection helped, without claiming credit or demanding a result.

Make introductions responsibly

Never forward someone’s details or promise access without consent. Ask each person separately, explain why the connection may help, and make the introduction only after both agree. Do not imply guaranteed results. Keep the introduction brief and let the two people decide what follows.

INTRODUCTION TEMPLATE “You mentioned [specific challenge]. I know [person/resource] has experience with [relevant area]. Would an introduction be useful? No problem if not.”

A practical distinction

A referral tells someone where to go. Opportunity discovery helps the person decide whether going anywhere is useful. The distinction matters because an introduction without diagnosis can add noise. The best modern word-of-mouth starts with attention and ends with a relevant, permission-based connection.

Three conversation patterns that travel well

Pattern	What it sounds like	Why it helps
Recognition	"You described [specific friction]. Is that still the main thing you are working through?"	Shows attention and allows the person to update the context.
Useful perspective	"One pattern I have seen is [insight]. Does that fit what is happening for you?"	Offers value without pretending your experience is a diagnosis.
Permissioned connection	"Would an introduction to [person] help, given [specific reason]?"	Links a relevant resource to a stated need and checks consent.

A simple introduction protocol

- Ask the person with the need whether an introduction would be useful.
- Ask the prospective connection whether they are open to being introduced.
- Send a short note to both that names the shared context and why you connected them.
- Let them take it from there; do not follow up with both parties as though they owe you an outcome.

Introduction example

"Jamie, meet Priya. Jamie is mapping a first customer success process for a growing services team. Priya has built onboarding workflows for teams at a similar stage. You both said you were open to connecting. I will leave you to decide whether a conversation is useful."

QUALITY TEST Would both people understand why they are in this conversation, and have both agreed to it? If not, do not make the introduction yet.

Practice lab — Make context travel

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. State the situation without embellishment

What did the person say they need or want?

2. Name the relevant resource

What person, resource, or perspective might help, and why?

3. Check consent on both sides

What exact permission do you still need before connecting anyone?

4. Draft the introduction

Write two sentences that explain the connection and give both people room to choose.

TAKEAWAY What will I do differently in my next conversation?

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Chapter 3 — The Opportunity Discovery Mindset

Stop chasing. Start recognizing.

Chasing treats people as targets who must be moved through a funnel. Recognition treats them as decision-makers with context. The shift is not passive: it asks you to pay closer attention, research appropriately, ask better questions, and make clearer invitations. It is also more selective. You stop pursuing every reply as if it were a lead.

The question before the message

ASK YOURSELF What have I observed that suggests this conversation could be useful to this person, and what do I still need to learn?

Observe signals, not fantasies

Signal you can responsibly use	Avoid turning it into
A public post where they ask for a recommendation	An assumption that they want your service
A role change they announced themselves	A story about their private pressures
A challenge they described directly	A diagnosis they did not ask you to make
A shared professional event or topic	A claim of closeness or familiarity you do not have

A simple opportunity hypothesis

Write one sentence before you reach out: “Because [observable signal], they may be working on [possible priority]. I can ask [open question] to learn whether that is relevant.” Keep the words “may” and “whether.” They protect you from turning a clue into a conclusion.

EXAMPLE Signal: A founder publicly asks how to reduce support tickets during onboarding. Hypothesis: They may be improving activation or support efficiency. Question: “You mentioned onboarding tickets are growing. Which part of the journey is creating the most friction?”

Use a relevance check

- Specific: Can you name the signal without sounding like surveillance?
- Current: Is it recent or still plausibly relevant?
- Connected: Is there a genuine link to the conversation you want?
- Human: Would the message feel reasonable if read aloud?
- Optional: Can they ignore or decline without awkwardness?

Four kinds of value before an offer

A conversation can be valuable when it gives the person clarity, a useful resource, a relevant perspective, or access to another person. A paid service is only one possible next step. Do not pretend every conversation is altruistic: be honest about your role and interests while making the other person’s choice real.

Choose the right opening by relationship

Relationship	Best starting point	Example
Warm contact	Shared context or a prior conversation.	"You mentioned last month that you were revisiting your referral process. How is that going?"
Loose professional connection	A recent, specific signal they shared publicly.	"Your post about project handoffs caught my eye. Where does context most often get lost?"
New contact	A relevant, transparent reason for contacting them.	"I work with independent studios on client onboarding. I saw your question about kickoff delays—are you looking for approaches or a provider?"

Decide whether to send, wait, or close

Choose	When	Action
Send	Signal is current, relevant, and appropriate; your question is honest.	Send one short message.
Wait	You lack context or the person appears occupied with something unrelated.	Learn more only from appropriate sources; do not invent urgency.
Close	They declined, asked not to be contacted, or clearly have no interest.	Respect the boundary; remove them from follow-up.

Practice: write the hypothesis, then erase it

Before messaging, write your opportunity hypothesis in private. Then draft a message that asks about the person’s reality without stating your hypothesis as fact. Example: private hypothesis—“Their expanding team may be creating handoff complexity.” Message—“I noticed your team has grown this year. What has been the biggest adjustment in how work gets handed off?” The question gives them room to say the issue is elsewhere.

MINDSET CHECK The other person is the authority on their situation. You are responsible for asking well and representing your capabilities accurately.

Practice lab — Build an opportunity hypothesis

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. Signal

What current detail makes a conversation potentially relevant?

2. Hypothesis

What might be important to them? Keep this explicitly tentative.

3. Unknown

What fact could change your view of whether there is a fit?

4. Question

Write one open question that helps them explain their situation in their words.

TAKEAWAY What will I do differently in my next conversation?

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Chapter 4 — The Strategic Conversation Framework

Observe → Understand → Clarify → Connect

These four movements help you decide what to do next. They are not a rigid script. People can move back and forth; a new fact may change your view. The framework protects against the common error of communicating an answer before you know the question.

Movement	Your job	Question to hold	Common mistake
Observe	Identify a real, relevant signal.	What did they actually say or do?	Treating an assumption as a fact.
Understand	Learn the situation in their terms.	What matters to them here?	Jumping to advice or your offer.
Clarify	Check the problem, outcome, stakes, constraints, and readiness.	What would make a next step worthwhile?	Mistaking polite engagement for intent.
Connect	Offer the right next step, if there is one.	What choice would help them move forward?	Pushing for a call or sale by default.

1. Observe

Use information the person has made available in an appropriate context. Keep the opener anchored to one detail. Do not bundle multiple biographical details to prove you researched them; that can feel invasive. If you cannot describe the reason for contact simply, wait and learn more.

Message pattern: “Hi [name] — I saw your note about [specific topic]. I’m curious: [one genuine question]?”

2. Understand

Invite their story and listen for meaning, not just keywords. Ask one question, then let them answer. Use their language in your reflection. Avoid interview mode: explain briefly why you are asking, and share relevant context about yourself where it makes the exchange reciprocal.

Useful prompts: “What prompted you to look at this now?” “What have you already tried?” “Which part is proving hardest?”

3. Clarify

Summarize the current situation, desired outcome, and obstacle. Ask about timing and constraints only when those factors matter to a possible next step. Offer your interpretation as a testable guess, not an authoritative diagnosis.

Clarifying sequence: “What is happening?” → “What would you like instead?” → “What is in the way?” → “How important is it to address now?”

4. Connect

Choose the smallest useful next step. That could be sharing one resource, making an introduction, answering a question, scheduling a call, proposing paid work, or doing nothing. State what the step involves and why it fits. Ask permission. Make declining comfortable.

Invitation pattern: “Based on [their stated need], I could help with [specific scope]. Would you like to [clear next step]? If now is not the time, that is completely fine.”

A worked example

Moment	Conversation
Observe	"I saw your post about the handoff from marketing to sales. What part is hardest to make consistent?"
Understand	"So leads arrive, but reps do not have enough context to follow up confidently. How often is that happening?"
Clarify	"You want a repeatable handoff, and missing notes are the bottleneck. Is solving it a priority this quarter?"
Connect	"I help teams map that handoff. I can share a short checklist, or we can spend 20 minutes mapping your current process. Would either be useful?"

STOP RULE If the person is not interested, does not reply, or changes the subject, do not keep escalating. One courteous follow-up may be appropriate when the context supports it; repeated nudges are not discovery.

DM examples: three starting situations

Context	First message	If they reply
A public question about a challenge	"You asked about keeping proposals moving after the first call. Where do prospects most often stall?"	"That makes sense. What have you tried so far, and what happened?"
A new role or business change	"Congrats on opening the second location. What are you most focused on making consistent across both teams?"	"Is consistency something you are actively tackling, or just something you are observing right now?"
A warm contact who raised a goal	"Last time we spoke you were aiming to free up Fridays. Has anything changed in the way your week is structured?"	"What is still taking time that you would rather spend elsewhere?"

DM examples: avoid these rewrites

Avoid	Why it misses	Grounded alternative
"I help businesses like yours scale. Got 15 minutes?"	Generic claim and immediate commitment request.	"You mentioned [specific issue]. Is that still a priority?"
"I have the perfect solution for your problem."	Assumes both the problem and the solution fit.	"Would you be open to comparing a couple of approaches?"
"Just bumping this to the top of your inbox."	Centers your need for a reply.	"If this is not relevant right now, I will leave it here."

A useful conversation is not an interrogation

Pair each question with a reason. Share a relevant piece of your own context when it helps the person understand why you are asking. Ask one question at a time; if the person gives a short answer, do not stack more questions on top. A pause or a change of subject can be a cue to stop probing.

Practice lab — Map a conversation

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. Observe

What specific signal grounds the opener?

2. Understand

What one question would invite context?

3. Clarify

How will you reflect the situation and check the desired outcome?

4. Connect

What is the smallest useful next step, and how will you make declining easy?

TAKEAWAY What will I do differently in my next conversation?

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Chapter 5 — The 7-Day Strategic DM Discipline

Turn awareness into practice

Opportunity discovery improves through repetition and review. This seven-day cycle builds the habit without turning people into a quota. Use a small number of conversations you can handle thoughtfully. If a day is busy, do a five-minute version rather than sending rushed messages.

Day	Focus	Practice	Evidence of completion
1 — Notice	Attention	List five public or direct signals tied to real goals or problems. Separate facts from guesses.	Five signals plus one uncertainty for each.
2 — Select	Relevance	Choose one or two signals that connect honestly to your experience. Draft a one-sentence hypothesis.	A clear reason to reach out—or a decision not to.
3 — Open	Permission	Send one specific, low-pressure opener. No pitch hidden in the question.	A message the recipient can answer or ignore easily.
4 — Listen	Understanding	In active conversations, ask one open question and reflect back the answer.	A summary checked by the other person.
5 — Clarify	Diagnosis	Ask about desired change, obstacle, and timing when relevant.	A written fit assessment with unknowns marked.
6 — Connect	Useful action	Offer the smallest appropriate next step, or close without an offer.	A clear invitation, resource, referral, or graceful close.
7 — Review	Learning	Review the week. Note what surprised you and change one behavior.	A short weekly scorecard and one experiment.

Daily 10-minute rhythm

- Two minutes: scan the context you already have permission to use.
- Three minutes: choose one signal and write what you know versus what you assume.
- Three minutes: send or respond to one message only if it is genuinely relevant.
- Two minutes: record what you learned and the next respectful action.

Weekly review questions

- Which opener led to an actual exchange, and why might that be?
- Where did I assume interest, urgency, or authority without checking?
- Did I reflect the person’s situation accurately?
- Did I make any invitation before clarifying the outcome they wanted?
- Which conversation should I close, follow up on with permission, or leave alone?
- What is one small behavior I will test next week?

Plan one week of practice

Choose a sustainable rhythm. It is acceptable for a day's practice to be observing, reviewing, or deciding not to send.

Day	Practice focus	My specific action
1 — Notice	Find grounded signals	
2 — Select	Check relevance	
3 — Open	Start one useful conversation	
4 — Listen	Reflect before advising	
5 — Clarify	Check outcome and constraints	
6 — Connect	Offer a fitting next step	
7 — Review	Capture learning and adjust	

Keep score without gaming the goal

Track	What it tells you	Do not use it to
Relevant conversations	Whether you are finding authentic openings.	Justify indiscriminate volume.
Needs clarified	Whether conversations are producing understanding.	Pressure people into a problem statement.
Permission-based next steps	Whether your offers are timely and clear.	Treat every “yes” as a sale.
Useful outcomes, including no-fit	Whether judgment is improving.	Claim causal success you cannot verify.

The seven-day practice log

Day	One signal I noticed	One thing I learned	My next action
1			
2			
3			
4			
5			
6			
7			

Common practice traps

Trap	Correction
Sending a message every day just to complete the challenge.	The daily discipline is observation and learning; “do not send” can be the right action.
Turning the week into a lead quota.	Track clarity and relevance. Do not score people as wins or losses.
Following up because the calendar says so.	Follow up only when the person welcomed it or context makes one courteous check-in appropriate.
Changing the whole approach after one quiet day.	Review a small set of conversations before making a process change.

END-OF-WEEK PROMPT What did people teach me about the problems they actually care about, and what will I ask differently next week?

Practice lab — Review the 7-day discipline

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. Strongest signal

Which observation led to a relevant conversation, and what made it useful?

2. Best learning

What did someone say that changed your original assumption?

3. Judgment call

Where did you choose to wait, stop, or not send? Why was that appropriate?

4. Next experiment

Choose one behavior to practice next week. Define what you will notice to judge its usefulness.

TAKEAWAY What will I do differently in my next conversation?

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Chapter 6 — From Conversation to Opportunity

Listen → Understand → Diagnose → Invite

A conversation becomes an opportunity when it identifies a meaningful gap the person wants to address and a credible next step exists. The four moves below keep the transition natural and ethical. A diagnosis is a shared description of the gap, not a trick for creating urgency.

Listen: attend before you respond

Listen for repeated friction, consequences, attempts, and emotional weight. Notice what is missing, but do not fill gaps with assumptions. Use short acknowledgements and questions. Avoid composing your pitch while the person is talking.

Understand: reflect the full picture

Summarize situation, desired outcome, and obstacle. Ask what you have missed. If your summary is wrong, update it. If the person has not named a desired change, do not impose one.

Diagnose: name the gap carefully

A useful diagnosis connects the current state to the desired state and identifies a plausible obstacle. Keep it provisional: “It sounds like...” or “Would it be fair to say...?” Separate what you know from what needs further assessment. For high-stakes, regulated, or specialized problems, stay within your competence and refer to a qualified professional.

Invite: make the next step concrete

An invitation should make four things clear: what the step is, how much time or commitment it takes, what the person gets from it, and that the choice is theirs. The next step should match their readiness. A short resource may fit better than a discovery call; a call may fit better than a proposal.

Readiness observed	Appropriate next step
Exploring, low urgency	Offer a resource or answer one question.
Problem is clear, timing uncertain	Ask whether they would like a follow-up at a date they choose.
Wants change, needs options	Discuss possible approaches and trade-offs.
Requests your help, scope is clear	Explain process, price or decision steps plainly.
Need is outside your expertise	Say so and, with permission, suggest a qualified resource.

Responding to common replies

Reply	Good response
“Tell me more.”	“Sure. Which part would be most useful: how the process works, likely fit, or what it costs?”
“Not right now.”	“Understood. Would you prefer I leave it here, or check back at a time you choose?”
“We already have someone.”	“Good to know. Is there anything still unresolved, or are you set for now?” Accept the answer.
“How much?”	Give a direct range or explain what affects price. Do not withhold basic information to force a call.
No reply	Usually stop. If there is a legitimate reason and enough context, send one brief follow-up, then leave it.

FOLLOW-UP EXAMPLE “Hi [name] — circling back once on my question about [topic]. If it is not a priority, no reply needed. Wishing you well with [relevant goal].”

Scenario: the tempting but premature pitch

A consultant sees a founder write, “Our team is stretched thin.” The consultant immediately offers an operations audit. But “stretched thin” could mean cash constraints, a hiring gap, a busy season, or a deliberate choice to grow slowly. Better next move: “When you say stretched thin, where are you feeling it most?” If the founder says they are hiring and not seeking help, stop. If they name a costly bottleneck and ask for options, clarify the desired outcome and timing before describing a service.

Scenario: a clear need with no fit

A service provider hears a detailed need but realizes it requires technical expertise outside their scope. A useful outcome is still possible: acknowledge the need, state the limit clearly, and ask whether a referral would help. Do not stretch a service description to preserve the sale. Trust is strengthened when boundaries are clear.

Scenario: a clear fit with timing uncertainty

A small business owner wants to improve client retention but is focused on a product launch for the next six weeks. Ask whether they want to revisit after launch and let them name the timing. Record the date only with their agreement. A timely conversation later is more useful than a sequence of reminders now.

When should you invite?

- They have named a problem or goal in their own words.
- You have checked what better would look like.
- You understand the main constraint or unknown.
- Your proposed next step matches their readiness and your competence.
- You can explain the next step without implying guaranteed results.
- The person has shown openness to continuing.

IF ONE IS MISSING Ask a clarifying question, offer a smaller resource, or close the conversation. Do not fill the gap with persuasion.

Practice lab — Decide whether to invite

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. Need and desired change

Quote or summarize the outcome in the person’s language.

2. Constraint and timing

What could make a next step impractical right now?

3. Fit and limits

What can you credibly do? What is outside your scope?

4. Invitation or close

Write a specific permission-based next step—or a graceful close if it is not a fit.

TAKEAWAY What will I do differently in my next conversation?

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Chapter 7 — Becoming an Opportunity Creator

The identity shift

Stage	Default focus	New capability
Message sender	What do I want to say?	Communicates clearly.
Conversation starter	How do I invite a reply?	Opens a relevant exchange.
Problem recognizer	What is happening for them?	Separates signals from assumptions.
Opportunity creator	What would help, and is there a fit?	Connects a real need to a useful next step with consent.

The identity is earned through behavior, not a label. An opportunity creator is willing to discover that there is no opportunity. They can listen without rushing, say “I’m not the right person” when true, and offer a next step without attaching the person’s worth to the answer.

What changes in practice

- You prepare by learning context, not memorizing a pitch.
- You ask questions whose answers could change your recommendation.
- You treat “no,” “not now,” and silence as information about consent and timing.
- You make introductions carefully and protect both people’s agency.
- You review patterns without reducing people to conversion statistics.

Your 30-day commitment

Choose a sustainable weekly rhythm. For the next 30 days, commit to a modest number of relevant conversations, one weekly review, and one skill to improve. Do not commit to a number of sales outcomes you cannot control. Revisit your commitment after the first week and adjust to the real capacity you have.

My practice	My answer
The people I can genuinely help are...	
The situations I am qualified to help with are...	
Signals I can responsibly use are...	
My weekly conversation rhythm is...	
One behavior I will practice first is...	
A clear sign that I should stop or refer out is...	

Your personal principles

Complete these statements and keep them visible while you practice:

Commitment	My words
I will only use context that is...	
I will ask before I...	
I will never imply...	
When I am not the right person, I will...	
I will treat a no as...	

A four-week progression

Week	Practice emphasis	Review question
1	Specific observation and fact-versus-assumption notes	Did my questions leave room for correction?
2	Listening and reflective summaries	Could the person recognize their own situation in my summary?
3	Clarifying desired outcomes and constraints	Did I understand timing and readiness before proposing?
4	Permission-based invitations and graceful closes	Did the next step match what the person asked for?

MEASURE PROGRESS BY How accurately you understand, how appropriately you connect, and how well you respect the person’s choice.

Practice lab — Set your practice standard

Use this page after reading the chapter. Work from a real conversation or a realistic situation. Keep private details out of your notes unless you have a legitimate reason and permission to record them.

1. Who can I help well?

Name the people, situations, and outcomes that match your capability.

2. What is my weekly rhythm?

Choose a sustainable amount of observing, conversing, and reviewing.

3. What is my stop rule?

Write the boundary you will honor when someone declines or the fit is wrong.

4. What will I improve first?

Choose one observable behavior for the next 30 days.

TAKEAWAY What will I do differently in my next conversation?

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Field tools

The message builder

- Ground in one signal: “I saw/read/heard [specific, appropriate context].”
- Name the reason: “I’m asking because [honest connection].”
- Ask one open, answerable question: “[question about their situation].”
- Keep the exit easy: “If this is not relevant, no need to reply.” Use this sparingly; the message itself should already be low-pressure.

COMPLETE TEMPLATE “Hi [name] — I saw [specific signal they shared]. I work on [brief relevant area], so I was curious: [open question]? If you are not focused on this now, no worries.”

Build a message for a real conversation

Complete the fields before you write the full message. Use only information the person shared in an appropriate context.

Message element	My draft
Grounded signal	
Honest reason this is relevant	
One open, answerable question	
Easy way to decline or correct me	
Full message in my natural voice	

The 90-second pre-send check

Check	Yes / revise
Can I name the signal without guessing about their private life?	
Is the connection between the signal and my question clear?	
Is this message transparent about who I am and why I am writing?	
Does the question invite a real answer rather than steer to my offer?	
Can they decline, ignore, or correct me without social penalty?	

The conversation map

Discovery area	Notes in their words
Current situation	
What matters and why	
Desired outcome	
What they have tried	
Main obstacle or constraint	
Timing and readiness	
What remains unknown	

The fit decision

Question	Decision
Is the need real and stated by them?	
Do they want a change or simply want to be heard?	
Can I help competently and credibly?	
Is a next step timely and proportionate?	
Have they agreed to explore that step?	

If any answer is “no,” do not pitch. If any is “unclear,” ask or pause. If all are yes, make one concrete invitation.

Conversation close-out note

Prompt	Record
What did I learn that I did not know?	
What did I assume that I should check?	
What value did the person receive today?	
What next step did they choose?	
What is the follow-up date or stop condition?	

A compact field card

BEFORE What signal makes this relevant? What do I still not know?
DURING Listen. Reflect. Check. Ask permission before offering.
AFTER Record learning. Honor their choice. Close the loop—or stop.

Final principle

The Good News is not that every conversation turns into business. It is that a person can leave with more clarity, a useful connection, or a next step that fits. When your messages help people recognize what matters and choose what to do, word-of-mouth becomes more than a recommendation: it becomes a thoughtful path from understanding to opportunity.

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