

Give, don't ask.

Help buyers before you ask them to buy.

A practical guide to Non-Gated Demand Orchestration. Give people knowledge and tools they can use, connect the work around their progress, and learn what to change.

01 /

Understand

One buyer. One problem. One mission.

02 /

Give

Useful help before personal details.

03 /

Connect

One clear job for every channel.

04 /

Learn

Decision, owner and review date.

Free to read, share and use. No form. No email address required.

Based on Carlos Justino's book *Give, don't ask: Give away your best knowledge and become the obvious choice.*

Version 1 / October 2026 / English

Four kinds of work. One shared score.

01 / Understand

Find the problem worth helping with. One buyer. One problem. One mission.

Leave with: A clear brief, evidence and a boundary. **Watch:** Audience fit.

02 / Give

Make the answer useful and open. Show the result before asking for details.

Leave with: Help people can use even if they never buy. **Watch:** The promise kept.

03 / Connect

Keep the promise, wherever people arrive. One job per channel. Human help when wanted.

Leave with: A route from useful knowledge to optional help. **Watch:** Buyer-requested conversations.

04 / Learn

Turn what you notice into what you change. Observation, decision, owner, review date.

Leave with: A supported decision that improves every asset. **Watch:** Time from finding to fix.

The rule for forms

Ask only when the buyer has chosen something that needs their details: a meeting, proposal, tailored assessment, private account or live event.

Five evidence levels

Usefulness > Buyer progress > Intent > Conversation > Commercial result

These are the team's responsibilities, not compulsory stages for the buyer. Start with one campaign, one audience, one problem and one owner. A 30-day plan is a working sequence, not a promise of revenue.

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The Give, Don't Ask Playbook

A practical guide to Non-Gated Demand Orchestration, from Carlos Justino's book "Give, don't ask" and how WitFlow applies it.

Version 1, October 2026. Free to read, share and use. No form, no email address required.

Help buyers before you ask them to buy.

About this playbook

What it is

This playbook turns the method in Carlos Justino's book *Give, don't ask: Give away your best knowledge and become the obvious choice* into something a B2B team can use on Monday morning. It explains why the method exists, sets out its four kinds of work, gives you plans for the first 30 and 90 days, and includes templates you can copy.

The method is called Non-Gated Demand Orchestration. The book defines it as "a continuous way to give buyers useful knowledge and tools before asking for personal information, learn from consented behaviour and market intent, and coordinate marketing and sales around the buyer's progress."

Who it is for

B2B marketers who have to make this change work inside a real business. Founders, sales leaders and agency teams face the same decisions from different positions, so they will find it useful too.

How to use it

- Read section 1 if you need to explain the change to a colleague.
- Read section 2 to understand the four kinds of work: understand, give, connect and learn.
- Pick one campaign and follow the 30-day plan in section 3.
- Copy the templates in section 4 into a shared document.
- Keep section 6 (what not to do) and section 7 (the formula on a page) close by.

Notes on sources and examples

- Quotations in this playbook come from the book and are marked with quotation marks.
- Research findings are the ones the book cites. They describe the buyers surveyed, not a rule every purchase follows. The full list is in section 8.
- **Examples are illustrative.** Maya, Nina, Sam and Ravi are fictional teaching characters from the book. They are not clients, and their companies are not real. Where an example comes from Carlos's own projects, it says so, and it is told as the book tells it, without added numbers.
- This playbook contains no client results, testimonials or invented statistics.

1. The why: buying changed, marketing kept asking first

1.1 What changed in buying

The book opens with a fictional marketing director called Maya. Her pipeline has slowed and she has a meeting with her chief executive. She finds a report that looks useful, clicks download and meets a form asking for her name, work email, company, job title, company size, country and telephone number. She knows what follows: the report, an automated email, then a sales call.

So she opens an AI assistant instead, describes her problem in her own words and gets a starting point in minutes. The company with the report sees an abandoned landing page and no lead. As the book puts it: "The buyer did not disappear; she found an easier path to the answer."

That is the gap the method addresses: "Companies still behave as if knowledge is scarce, while buyers know that it is available almost everywhere."

Several things have changed at once:

- **Buyers learn on their own first.** Gartner found that a majority of the B2B buyers it surveyed preferred an overall experience without a sales representative, although they still wanted human input for decisions that needed context and judgement.
- **Preference forms early.** Research from 6sense found that buyers often formed a preference before contacting sellers. By the time someone asks for a proposal, much of the decision has already been shaped.
- **AI moved the questions off your website.** Buyers can investigate a problem without visiting your site, compare options before your analytics record a session and arrive at a sales conversation with a shortlist, objections and a view of what you should cost.
- **The buying group is mostly invisible.** Research by Edelman and LinkedIn found that influential internal stakeholders use expert content during vendor evaluation, even when they remain invisible to the seller.
- **Most of your market is not buying this month.** John Dawes's 95-5 rule, shared through the LinkedIn B2B Institute and the Ehrenberg-Bass Institute, is a planning principle rather than a measurement of your market. Its practical lesson is to stop judging every encounter as though the person should buy now.
- **Buying never followed the funnel.** People jump ahead, go backwards, ask a colleague, disappear for a month and come back with a different question. "The funnel was tidy, but buying remained human."

1.2 Why gated tactics fail

The gate solved a real problem once. It made the exchange visible: the company offered an asset, the visitor gave their details and marketing could count the response. Over time, teams began to judge content by the number of names it captured.

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That created four problems.

- **A form fill is not intent.** People complete forms for many reasons: active buying, general learning, academic research, competitor research, curiosity about one statistic, interest in the author, or simple willingness to tolerate the form. Treat them all as leads and you create work for sales and irritation for buyers. "The company has mistaken access for intent, and the buyer has learnt that the apparent gift came with a string attached."
- **The visible lead hides the real buyer.** One person downloads your report with a false phone number. Another reads three open articles, uses a calculator and shares the result with a colleague without filling anything in. Your system calls the first a lead and the second ordinary traffic.
- **Volume hides fit.** In a project for a large software house described in the book, a famous report attracted plenty of form fills, yet fewer than two per cent of those leads matched the company's ideal customer profile. The book is careful about what this proves: it exposed a targeting problem, not that the form alone caused it.
- **The gate slows knowledge down.** Open knowledge can travel to the hidden buying group through colleagues, search results, AI answers and shared documents. A gated asset makes that movement harder.

Forms still have a job. The book is clear that forms belong after a clear decision to engage, when a buyer asks for a meeting, a proposal, a tailored assessment, access to a private account, a place at a live event, a personal response or saved results that must be delivered securely. Think of a bookshop: you can browse and ask for advice without giving your phone number, but reserving an out-of-stock book reasonably needs one. Same fields, different place, different meaning.

1.3 Why push tactics fail

Push tactics ask for a meeting before the buyer has a reason to want one. They fail for similar reasons.

- **Irrelevant outreach makes the next message harder to trust.** Gartner's research, cited in the book, found that many B2B buyers actively avoided suppliers whose outreach was irrelevant.
- **Personalisation often decorates the same request.** Adding a first name, a mention of a new office and a warmer tone does not give the recipient anything they can use.
- **Repetition is not value.** "Rephrasing the same meeting request does not become more useful because the interval between messages was selected by software."
- **Inconsistency costs trust.** Gartner found that 69 per cent of the buyers it surveyed encountered inconsistencies between a supplier's website and what its salespeople told them. More exposure to a confused company creates more uncertainty, not more demand.

1.4 Stop adding noise: marketing as a symphony

Most companies are not short of marketing activity. They publish content, run adverts, send emails, post on social media, build landing pages, track analytics and ask sales to follow up. Yet the activity

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produces little movement.

The book describes it like this: "It can sound like an orchestra warming up, with every instrument working but nobody sharing the same score." The social team discusses one problem, the advert promises something else, the landing page repeats a generic company description, outreach arrives with a third message and sales starts the conversation without knowing what the buyer has already learnt.

"Adding more activity only makes the noise louder."

The answer is to play from the same score, like a symphony. Orchestration gives every part of the system the same mission, context and feedback. Buyer questions shape content, intent affects timing, tool usage improves landing-page copy, and sales conversations reveal gaps in the website. Each instrument plays a different part from the same score. The book calls this shared plan the **campaign score**: it records the buyer's questions, the help available, the people responsible and the learning that should change their work.

Orchestration is also what makes marketing efficient. When every channel has one clear job and one person owns the whole buyer experience, the team stops paying for duplicate work, mismatched promises and leads nobody can use.

1.5 Being found is not enough

Carlos often puts it this way in his talks: being found is no longer enough. A company has to be understood, recommended and chosen.

The book is cautious about how to get there. A favourable AI answer, a citation or a perfect technical score is not proof of demand or revenue. Carlos's own audit work brought client websites close to 100 in Google PageSpeed Insights, and the book is clear that this gave a stronger technical base without deciding whether those companies appeared in the answers buyers were asking for elsewhere.

What earns the recommendation is useful, accurate knowledge that can be found, understood when it is quoted out of context and traced back to its source. That is the work of the give and connect stages below.

1.6 What we learnt from our own outreach

In September 2026, WitFlow ran its own outbound test. Cold emails that led with a product feature and asked people to click a generic link to a free audit produced almost no replies and no sales conversations. One of the few people who did reply said their company does not open external links. The sample was small, so it does not prove the message was wrong, but the pattern matched what the book argues: a feature-led ask that needs a click before the reader gets anything is easy to ignore.

The live rooms behaved differently. The workshops we ran in London and Manchester, where people came to learn something and stayed to talk, are where the warmest conversations started.

The lesson we took into this playbook: give the value inside the message or the room, keep the next step optional, and put human time where people have chosen to be.

2. The method: understand, give, connect, learn

2.1 The method in one paragraph

Non-Gated Demand Orchestration connects four kinds of work. **Understand** the business and the people it can help. **Give** them knowledge or tools they can use before identifying themselves. **Connect** that help to the places they spend time and the questions they ask next, including human guidance when they want it. **Learn** from appropriate evidence and carry the findings back into the campaign.

2.2 Four principles that hold it together

- **These are the team's responsibilities, not stages the buyer must pass through.** In the book's words, they are the team's responsibilities, "rather than four compulsory stages for the buyer". Someone can arrive ready for a proposal, use a tool privately or return months later with a colleague.
- **Give first, ask only for what the requested help needs.** "If you promise an answer, give the answer; if you offer a calculator, show the result; if you publish a guide, let people read it."
- **Observe more, intrude less.** "Marketing does not become blind when the gate disappears; it must become more observant." Consent and privacy still apply, and anonymous people stay anonymous until they decide otherwise.
- **People keep the judgement.** "The machine provides capacity, while people provide judgement." AI can research, draft and adapt from shared context. People decide what is true, what is promised and what gets sent.

2.3 The method on one page (from the book)

Work	Leave with	Return when
Understand	A buyer problem, its evidence and a clear mission.	A finding challenges the audience or promise.
Give	An open answer or tool the person can use.	People cannot use the result as intended.
Connect	Relevant distribution and optional next steps, including human help.	A channel breaks the promise or misses the audience.
Learn	A supported decision, an owner and a review point.	The result supports a correction or a new question.

2.4 The running example used in this section

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Illustrative example (fictional, from the book). Nina leads marketing for a supplier that helps B2B teams organise incoming enquiries. Sam handles its sales conversations. Maya, the marketing director from the introduction, is someone their work could help. None of these people or companies is real; the book uses them to show decisions closely without presenting an invented success as a client result.

Stage 1: Understand

Goal: know one buyer, one problem and why your business is qualified to help, well enough that a colleague could explain it back to you.

Core questions

- Who is the person inside the right kind of company, and what are they trying to get done?
- What problem do they describe in their own words, and what does it cost them?
- What have they already tried, and where did the available answers fail them?
- Why does our business work the way it does? What has the owner learnt that is not written down anywhere?
- Where can we give something useful before any commercial conversation?
- What would make us reconsider this campaign?

Concrete actions

- **Interview a few people from the audience about a recent situation.** Ask what they were trying to do, what prompted the search, where they looked first and what they could do after reading something useful. Avoid asking whether they liked your content.
- **Interview the owner and the delivery team.** Ask why the business refuses certain projects, why the service is built this way and what happened when an earlier approach failed. The book calls this missing understanding "the soul of the business".
- **Separate what a "lead" can mean.** Keep identity (who is this?), fit (does the problem fit our market?), interest (are they paying attention to a relevant problem?) and intent and readiness (is something changing, and are they preparing to act?) apart in your reporting.
- **Choose one problem.** One campaign per problem, unless your offer directly solves several connected difficulties and explaining them together helps the buyer.
- **Write the mission and its boundary.** State what the campaign will not promise.
- **Walk through your current marketing as a buyer,** on a phone as well as a computer, and build a gate inventory (see the worksheet below).

Worksheet: the mission sentence (from the book)

"Help [a defined audience in a specific situation] work through [a particular problem] by providing [useful knowledge or a practical tool], so they can [make a concrete decision or take a useful action]."

Beside it, record:

Field	What to write
Evidence	What we know about the problem, and where it came from
Assumptions	What we still believe without evidence
Boundary	What this campaign does not promise
Commercial link	How our paid offer might become relevant later, without making it the price of the first answer
What would change our mind	The finding that would make us rethink the audience or promise
People and time	Who owns the campaign, who checks accuracy, and the period we are giving it

Worksheet: gate inventory (from the book)

Page	Promised value	Information requested	Value received before the form	What happens after submission
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Then test each form with the book's five questions:

- Does the buyer receive something genuinely personal or scarce?
- Is personal information required to provide that value?
- Can we give a useful version before asking?
- Have we explained what will happen after submission?
- Would I complete this form if I were the buyer?

Illustrative example. Nina starts with a request to "sell more" and an idea for a guide to managing enquiries. When she and Sam trace one real enquiry, they find it did not vanish. It reached the right department, where everyone assumed somebody else would reply. Her mission becomes: "Help small B2B teams find where responsibility for an enquiry becomes unclear, using an open diagnostic and a worksheet they can discuss internally, so they can agree who takes the next action." Her boundary: the campaign does not promise more enquiries, measure every lost sale or claim that software is necessary.

Metric to watch: fit of the people you reach. What share of the people who use your help match the company profile and roles in the mission? Pair it with a simple test: can a colleague who did not write the brief explain who the campaign helps, which problem it addresses and why the proposed value belongs there?

Stage 2: Give

Goal: give the right people an answer or tool they can use straight away, without a form, so that someone who never buys can still point to what they received.

Core questions

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- What should the person be able to understand or do after using this?
- What is the smallest useful experience that answers the question: an explanation, a comparison, a planning resource, a diagnostic or a calculator?
- What information does the tool genuinely need to produce the result, and what would we only want for marketing?
- Where does the result stop being reliable, and have we said so?
- Does it still help if the person decides never to buy?

Concrete actions

- **Choose the format that helps the buyer do the task**, not the format that is easiest to call a lead magnet.
- **Put the help inside the page.** Show the result on screen. Offer an emailed copy only as a separate convenience.
- **Ask only for the inputs that change the result.** Allow answers such as "not agreed" or "I do not know". Avoid inviting confidential or personal information into open text boxes.
- **Keep arithmetic in checked logic.** If a tool calculates, the formula is fixed and tested. AI can help explain a result; it should not invent the numbers.
- **Run two reviews:** an expert checks accuracy, and someone less familiar checks comprehension.
- **Test the real experience:** on a phone, with missing answers, with odd inputs, and with the AI service unavailable. If generation fails, offer the checked worksheet, not an email field.
- **Keep authorship clear.** A resource that travels between colleagues should keep its title, source and an easy route back to further help.
- **Name an owner for maintenance.** The resource is a promise that continues after launch.

Worksheet: open value specification

Field	What to write
Promise on the page	One or two sentences the page must keep
Who it helps	The audience and situation from the mission
Inputs	Each question, why it is needed, and whether "I do not know" is allowed
Result	What the person sees on screen, in plain words
Limits	What the result cannot establish (for example, "this is current effort, not guaranteed savings")
Next useful step	Continue independently, read a related explanation, or ask for a conversation
What we do not ask for	Fields we deliberately leave out

Field	What to write
Test cases	Answers you can check by hand, plus an impossible and a misunderstood input
Owner	Who maintains accuracy, and who approves changes to claims

Illustrative examples (fictional, from the book).

- Nina's open diagnostic asks three questions: where does the enquiry arrive, what happens when it is passed on, and how can the team tell that somebody has accepted the next action? Maya's result explains that her team records where an enquiry is sent but not who accepts it, and suggests checking one recent enquiry. She downloads the worksheet without a sales call being a condition of access.
- Ravi's calculator estimates the staff time one recurring report consumes. Four people spending forty-five minutes each, once a week over four weeks, gives twelve person-hours. The page shows the working, lets him change the assumptions and explains that this is current effort, not a promised saving.

From Carlos's own work, as told in the book. WitFlow built an open website audit at webaudit.witflow.co. A company could examine its website's technical preparation, search visibility and presence in AI answers, and download a report without giving a name or contact details. Two or three companies used it, took the report to their internal teams and tried the fixes themselves. Later they came back to explain what had worked and what remained, and they eventually hired WitFlow's SEO and AEO services. The book is clear that this is not a conversion benchmark. What it shows is a sequence worth designing for: receive a result, try to use it, and return with a specific question when help is needed. A historical parallel in the book: the early Michelin Guide, first published free in 1900, helped motorists with fuel, accommodation and tyres before their next tyre purchase.

Metric to watch: the promise kept. What share of people who start the tool or resource reach the promised result, and can they use it? Pair it with voluntary feedback ("Did this help?"), shares and return use. "A useful tool should help a buyer make progress even if the buyer never becomes a customer."

Stage 3: Connect

Goal: get the help to the right people where they already spend time, keep the promise consistent from the first message to the destination, and make human help easy to ask for when they want it.

Core questions

- Where does this audience already spend time, and which channel can reach them before they are looking for a supplier?
- What single job does each channel have in this campaign?
- Does every message lead straight to the help it promised?
- What is the likely next question, and is the answer already waiting?
- How can a buyer ask for a person, and what will that person already know?
- Do we have a genuine reason and permission to contact someone directly?

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Concrete actions

- **Give every channel one responsibility.** "Assign one clear responsibility to each channel and one owner to the connected buyer experience." An advert helps the right person recognise a problem and reach the right destination. An article explains it. A tool helps the person examine their own case. A conversation handles the judgement that remains.
- **Teach inside the post.** A social post should give a useful idea on its own, with the link as an option, not a condition.
- **Check the promise at the point of arrival.** Read the advert aloud, open the landing page, and try to find the promised answer without help.
- **Rehearse the route** with someone who did not build it, from more than one entry point, on a phone and a computer.
- **Make outreach worth receiving.** Research for relevance, refer only to what the evidence supports, put the useful help in the message, set sequence limits before launch and stop when someone declines or changes the context.
- **Use rooms.** Workshops, clinics, webinars and small events let people bring their own questions. A place at a live event is one of the moments where a form makes sense.
- **Prepare the human conversation.** Sales follows four steps: establish fit, discover the real problem (listen for about 80 per cent of the conversation), design the solution together, then return to the beginning in the proposal. "Credentials tell them where you have worked; an explanation shows them how you think."
- **Keep legal permission separate from presumed interest.** Check the direct marketing rules for your audience and channel. In the UK, the Information Commissioner's Office guidance applies.

Worksheet: route map (one buyer question, end to end)

Entry point	Promise made there	Destination	Answer available	Optional next step	Owner
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Add one extra row for a colleague who receives the resource out of context: can they understand it without visiting your website?

Illustrative example (fictional, from the book). Nina's first advert led Maya to the supplier's general website, where she could not find the promised diagnostic, and a demonstration request appeared before the answer. Nina repairs the route so the advert leads straight to the diagnostic. Separately, Sam sees a public announcement that a company is adding a second sales team. Instead of offering a demo, he writes a short note that teaches the difference between forwarding an enquiry and accepting responsibility for it, with a direct link to the open worksheet. Reading it needs neither a reply nor an appointment. When the recipient replies with a different problem (duplicate replies when someone is away), Sam answers that question first.

Metric to watch: buyer-requested conversations and the context they bring. Count conversations the buyer asked for, and note what they arrive with: a result, a specific question, colleagues already involved. Track broken promises found in route checks as a second number.

Stage 4: Learn

Goal: turn what people do and say into decisions, owners and changes, so the next buyer gets better help than the last one.

Core questions

- What did we observe, and what else could explain it?
- Which decision would this signal change? If none, why are we collecting it?
- What is the smallest change the evidence supports, and who owns it?
- Which other assets carry the same mistake?
- When will we check whether the change helped, given how long buyers take to decide?

Concrete actions

- **Give each signal a job before collecting it.** Record what it shows, what it cannot establish, which action it could change and who decides.
- **Separate observation, interpretation and permission.** An aggregate pattern can justify clearer wording. Contacting a named person needs a different level of evidence and permission. The book's rule: "a visit does not create permission to contact someone."
- **Run a short review that ends in decisions.** Weekly is a good starting rhythm. Each item ends as change, investigate or leave alone, with an owner and a review point.
- **Change every affected asset,** not just the newest one: page, advert, posts, outreach, tool instructions and sales material.
- **Use five levels of evidence:** usefulness, buyer progress, intent, conversation and commercial result.
- **Agree the commercial test in advance:** a baseline, a spending limit and a review date that suits the buying cycle.
- **Keep what you learnt when the campaign ends:** questions that mattered, assumptions that failed, resources worth keeping public.

Worksheet: learning record (from the book)

Observation	Source and date	Interpretation	Other possible explanation	Proposed change	Owner	Review point	What we checked afterwards
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Illustrative example (fictional, from the book). Sam receives a reply about duplicate responses when someone is away. At a webinar, an attendee asks the same thing. Nina holds the next article, adds a cover arrangement and a visible response status to the worksheet, asks someone in delivery to check it, and updates the article, the diagnostic's result guidance, the social post and Sam's material. Her review question: can willing users now agree what happens during an absence? She also notes that two questions are enough to inspect an omission, not a survey of the market.

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Metric to watch: time from finding to fix. How long does it take for something the team learns to reach every asset buyers actually use? Pair it with the share of review decisions completed. "Stop treating reporting as completed work when no decision or improvement follows it."

3. Implementation plans for a B2B company

Both plans assume one campaign, one audience and one problem. They are starting sequences, not promises. In the book's words about the first month: "It is not a promise of revenue within a month."

3.1 Before day 1: the first working session

- Bring one live campaign and someone who knows what buyers ask after responding to it.
- Read its public promise together. Open the destination and try to get the promised answer without identifying yourselves.
- Record the first point where the answer disappears, the subject changes or the next step needs a colleague to explain it.
- Choose one repair within the team's authority, for example showing the result before offering an emailed copy.
- Write down the old promise, the repair, the owner and what you will check afterwards.

3.2 The 30-day plan

Days	Focus	Actions	You should leave with
1 to 7	Understand: establish the problem	Choose the audience and problem. Read what the team already knows. Interview the owner, delivery colleagues and a few people from the audience. Write the mission and its boundary. Build the gate inventory. Record a baseline.	A one-page brief a colleague can explain back to you, with evidence and open assumptions marked
8 to 14	Give: build the open value	Choose the smallest useful experience. Make the promised result visible without a form. Expert review for accuracy, newcomer review for comprehension. Test on a phone. Name a maintenance owner.	One working open resource or tool, tested and owned

Days	Focus	Actions	You should leave with
15 to 21	Connect: build the route	Choose channels and give each one job. Check that every message leads straight to the promised help. Prepare the answer to the next likely question. Make human help easy to request. Brief sales. Set up measurement and check permissions and notices. Rehearse with an outsider.	A route map, sales briefed, measurement configured
22 to 30	Learn: learn from use	Launch at a level you can support. Watch for questions and difficulties before celebrating volume. Hold the first learning review. Talk to willing users. Decide: continue, improve or revisit the assumptions.	A learning record with owned decisions, and a date for the next review

Small team roles. One person may hold several roles, but name them: owner of the whole buyer experience, accuracy checker, resource maintainer, and the person who reviews what happens after publication. Sales and delivery need a route into the review.

Tools. "You do not need my software to make the first campaign work," Carlos writes. A shared document, a page on your existing website and a short record of questions and changes are enough to start.

3.3 The 90-day plan

The book suggests that a ninety-day period can define the team's programme, but it "should not become a deadline imposed on the buyer's readiness." This plan extends the first month into a full cycle.

Days 1 to 30: build and launch one campaign. Follow the 30-day plan above.

Days 31 to 60: deepen the help and open the rooms

Week	Actions	Owner (suggested)
5	Act on the decisions from the first review. Update every affected asset, including sales material.	Campaign owner
5 to 6	Add the next piece of help for the most common follow-up question, for example a comparison for buyers weighing approaches. Fill gaps before adding volume.	Campaign owner and subject expert

Week	Actions	Owner (suggested)
6	Build a question set from interviews and sales conversations. Test how search and AI assistants answer them. Record wording, system, date, mentions and citations separately.	Content lead
6 to 7	Run one room on the campaign's problem: a workshop, clinic or webinar where people bring their own case. Registration is a legitimate form here.	Campaign owner and sales
7	Within 48 hours of the room, send what you promised and answer the questions people asked. Offer a conversation only to those who asked for help or showed it in the room.	Sales
7 to 8	Put the four-step sales conversation in place: fit, discovery, co-design, proposal. Bring recurring questions back to the brief.	Sales lead
8	If direct outreach is part of the plan, run a small, reviewed test to one micro-segment: value in the message, a reply-based ask, set sequence limits, every message checked by a person before sending.	Sales and campaign owner

Days 61 to 90: review honestly and decide

Week	Actions	Owner (suggested)
9 to 11	Keep the weekly learning review. Make focused changes and record the conditions around them, so you can tell which decision mattered.	Campaign owner
10	Repeat the question-set test with the same method. Improve weak sources before writing new pages.	Content lead
11	Fill in the learn dashboard across all five levels. Compare with the baseline using the same definitions.	Campaign owner
12	Commercial review with the budget owner. Bring the mission, the investment, what people could use, what happened commercially and the decision you recommend. If the buying cycle is longer than 90 days, agree when the commercial review becomes meaningful.	Campaign owner and budget owner

Week	Actions	Owner (suggested)
13	Decide: continue, repair, narrow or stop. Record what the first campaign taught you, what is reusable and what belongs only to this audience. Start a second campaign only if the first can teach it.	Leadership team

Conditions for changing the plan (from the book). If the audience is irrelevant, review distribution and the promise. If relevant people cannot use the result, repair the resource before increasing spend. If useful conversations keep failing because the paid offer does not fit, revisit the offer. If the agreed budget runs out without enough evidence, pause or narrow the campaign rather than using the philosophy as a reason to keep spending.

4. Templates

Copy these into a shared document. Each one has a blank version and, where useful, an illustrative row using the book's fictional enquiry-handover campaign.

Template A: Buyer-understanding canvas

Fill one canvas per campaign. Mark every entry as **evidence** (with its source) or **assumption**.

Block	Questions to answer	Evidence or assumption?
1. The company profile	What kind of organisation can we help? Size, market, how it works, resources	
2. The people	Who experiences the problem, who investigates it, who approves the decision?	
3. The situation	When does the problem show up? What triggers the search?	
4. The problem in their words	Exact phrases from interviews	
5. The cost of leaving it	What happens if nothing changes?	
6. What they have tried	Other suppliers, internal fixes, AI assistants, colleagues	
7. Their questions	Awareness: is this a problem for us? Consideration: what are the approaches? Decision: what fits us, at what risk and cost? Action: how do we start?	
8. What the owner knows	Why the business works this way, what it refuses, what it learnt from failure	
9. Where we can help openly	The knowledge or tool we can give before any conversation	
10. Where paid help becomes relevant	The point at which the buyer may want us, in their terms	
11. Signals that matter	Which observations would change what we publish, show or say	
12. What would change our mind	The finding that would make us rethink the campaign	

Template B: The "give" asset menu

WITFLOW.

What to give at each point in the buyer's thinking. The book uses awareness, consideration, decision and action to organise the help, not to ration access. A buyer may want a person at any point.

Buyer's question	Useful things to give openly	Good formats	Form?
Awareness: "Is this a problem for us?"	A clear explanation of a symptom and its cause. One distinction people can use straight away. An open diagnostic.	Social post that teaches the idea in full, short article, three-question diagnostic, explainer video with a written summary	No
Consideration: "What are our options?"	Criteria for comparing approaches, including when each one is a poor fit. Honest trade-offs. What a team can do itself.	Comparison page, worksheet, calculator that shows its working, recorded webinar with a written summary	No
Decision: "What fits us, and what are the risks?"	Implementation sequence, responsibilities, cost assumptions, evidence behind claims. Material a colleague in finance or IT can read on its own.	Planning tool or roadmap builder, implementation guide, scope and limits page, open pricing logic where possible	No, unless the buyer asks for a tailored assessment
Action: "How do we start?"	What happens next, what the buyer needs to provide, who will help.	Booking page, proposal, trial, private account	Yes. The buyer has chosen something that needs it
After the proposal, won or lost	Something useful to keep: a clear account of their situation, the roadmap and the reasoning	Proposal written to be read without the presenter	Not applicable
Rooms	A place to bring their own case and ask questions	Workshop, clinic, webinar, small event	Yes, for a place at a live event

Ask before giving anything: Does it answer a question this audience actually has? Can the person use it without us? Would we be comfortable if they used it with a competitor? If the answer to the last question is no, the help may be too thin, or tied too closely to a sale.

Template C: Non-gated content calendar

One campaign, four weeks. Every row must state what the reader gets **without clicking or filling in a form**.

Week	Buyer question	The help	Channel and its one job	What the reader gets without a click or form	Optional next step	Owner	What we will check
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Illustrative example (fictional, based on the book's enquiry-handover campaign):

Week	Buyer question	The help	Channel and its one job	What the reader gets without a click or form	Optional next step	Owner	What we will check
1	Why do enquiries wait?	Post explaining forwarding versus accepting responsibility	LinkedIn: help the right people recognise the problem	The distinction, and a suggestion to trace one enquiry from arrival to reply	Open diagnostic	Nina	Comments and questions from the intended roles
2	Where does it break for us?	Three-question open diagnostic and worksheet	Landing page: let people examine their own case	The result on screen and a downloadable worksheet	Article on agreeing responsibility	Nina	Share who reach the result; where people stop
3	What could we change?	Article comparing a process change with extra tooling	Search and AI answers: be the clear source for the question	A worked example and the limits of each approach	Webinar or clinic	Content lead	Questions people ask afterwards
4	Would outside help fit?	Live session on handover problems, plus a page explaining scope and limits	Room: let people bring their own case	The recording and a written summary for everyone, including those who did not attend	Request a conversation and choose what context to share	Sam	Buyer-requested conversations and the questions they bring

Template D: Connect playbook (consent-based follow-up and rooms)

D1. Match the response to the evidence

What you have	What it tells you	Proportionate response	Not justified
Aggregate pattern (for example, many people stop at one question)	Something on the page may be unclear	Improve the explanation, ask willing users	Contacting individuals
Public company event (for example, a new team announced)	A topic may be relevant to that account	Research, prepare a relevant resource, consider a reviewed message if permitted	Claiming you know their problem, budget or intent

What you have	What it tells you	Proportionate response	Not justified
Voluntary feedback or question	What this person found unclear	Answer it, and improve the resource for everyone	Starting a sales sequence
Registered for a room	They want that session	Send joining details, then what you promised after it	Treating registration as a sales opt-in
Asked for a conversation and shared a result	They want help with something specific	Prepare using what they chose to share	Revealing a history of their activity they did not expect

D2. Follow-up rules

- **Send what you promised first.** The recording, the worksheet, the answer to their question.
- **Answer the question they asked,** not the one in your sequence.
- **One reason per message.** Each follow-up adds new help (a clearer example, a comparison, a relevant guide). If it only repeats the ask, do not send it.
- **Set limits before launch:** how many messages, over how long, and which replies stop the sequence.
- **Respect a no, and treat silence as ambiguous.** Do not escalate, and do not ask the person to explain themselves.
- **Make the ask a reply, not a click.** For example: "Would it help if I sent you the worksheet we used in the session?" Put any link where the reader can use it without replying first.
- **A person reviews every outbound message** for the reason for contact, the facts, the value offered and whether the recipient is suitable.
- **Make objections stick** across every connected system, including manually kept lists.

D3. Rooms and events

When	What to do
Before	Pick one problem from the campaign. Invite people who have that problem. Say exactly what they will leave with. Ask only for the details needed to attend.
In the room	Teach the idea in full. Let people bring their own case. Leave time for questions. Write down every question asked.
Within 48 hours	Send the promised material to everyone. Answer open questions personally. Offer a conversation only to those who asked for help or showed it, with a simple way to say yes (two suggested times, or a reply).
Within a week	Bring the questions into the learning record. Update the resource if the room revealed a gap. Make the recording or summary available openly for those who could not attend.

D4. The human conversation

Step	Purpose	Outcome
0. Establish fit	A short check that there is a problem you can help with	Continue, refer elsewhere, or stop
1. Discover the real problem	Listen for about 80 per cent of the time. Explore consequences and the desired change	A shared account of the situation
2. Design the solution together	Shape the route with the buyer, including what they can do themselves	A plan the buyer recognises
3. Return to the beginning	The proposal restates the situation, the consequence, the desired result, the research, the roadmap, shared responsibilities and the investment	A proposal that "proves you listened"

Template E: Learn dashboard with leading indicators

The book organises evidence into five levels. Name an owner and a definition for each measure, and write down what it cannot tell you.

Level	Leading indicators to watch	What it cannot tell you	Owner	This period	Baseline
1. Usefulness	Share of people who reach the promised result. Voluntary "this helped" feedback. Reading depth on the key answer	Whether the person will ever buy			
2. Buyer progress	Shared results and forwarded resources. Return use. People describing what they tried or changed	The full path inside the buying group			
3. Intent	Specific implementation questions. Several people from one fitting account exploring the same topic (where you can observe this appropriately). Relevant public company events	A named person's private intention or budget			

Level	Leading indicators to watch	What it cannot tell you	Owner	This period	Baseline
4. Conversation	Buyer-requested conversations. Share that fit the mission's audience. Quality of context they bring	Whether the conversation will become revenue			
5. Commercial result	Proposals accepted, win rate, time to decision, retention, cost to win and deliver (lagging)	Which single asset caused the sale			
Learning health	Review decisions completed. Time from finding to fix. Mistaken assumptions recorded	Whether the market agrees with the change			

Dashboard rules

- Keep the evidence beneath any score visible: events, dates and uncertainty, not just a coloured label.
- When you show a rate, show both numbers that produce it.
- Keep definitions the same before and after you remove a gate.
- Ask buyers what helped them reach the conversation, and record it next to the tracked data.
- Separate mentions, citations, visits, useful interactions and commercial outcomes when reporting on AI and search visibility.
- Do not keep changing the success measure until the result looks good.

A note on comparing gated and open versions. The book offers a deliberately simplified hypothetical: a gated resource produces 100 contacts, ten relevant conversations and two customers; an open version produces 20 contact records, eight relevant conversations and three customers. Looking only at contacts makes the open version look weaker. The book adds that this does not prove opening the resource caused the difference; it shows why a form count alone cannot decide.

5. How WitFlow puts each stage into practice

WitFlow is a demand orchestration OS (operating system). Carlos built it to connect the four kinds of work in one place, and the team uses it in its own work. You can run this method with a shared document and the tools you already have. The book is explicit about that, and section 3 is written so you can.

What a connected system changes is the amount of context people have to carry by hand between research, content, pages, social, outreach and review. It does not change who is responsible. The company remains responsible for what it tells people and what it does with their information.

Stage	What the work needs	Where WitFlow helps	What people still decide
Understand	Company knowledge, market and account research, one mission and a brief	A knowledge base built from the company, its offer and brand; research and strategy work that examines the market, customers, alternatives and the business; a brief that guides everything that follows. WebAudit shows where a website stands on technical preparation, search visibility and AI answers.	Which buyer and problem to choose; whether the research is true; what the campaign will not promise
Give	Open answers and tools, published where questions are asked	The AI copywriter researches what search and AI assistants already say about a topic, finds weak or missing answers and drafts articles; the AI CMS queues approved articles for publication on the company's site. Landing pages can carry an open tool such as a calculator, diagnostic or audit. SEO and AEO work keeps the content accessible and understandable to search and answer systems.	Whether an answer is accurate; what the tool may claim; when something is ready to publish

Stage	What the work needs	Where WitFlow helps	What people still decide
Connect	Each channel with one job, consistent promises, and human help when wanted	Witfy.social prepares on-brand social posts from the same brief, so posts teach the same idea the page delivers. Link building looks for relevant sites where a useful resource deserves a mention. Outreach researches accounts and contacts and drafts messages, and a person approves every message before it is sent. Clarify CRM keeps the context a buyer chose to share, so a conversation starts from what they already know.	Who to contact and why; whether a message is worth receiving; when to stop
Learn	Signals with a job, reviews that end in decisions, changes across every asset	Analytics and intent inform new briefs and improvements. A daily routine brings each task back to the person who needs to review or complete it. Updated company knowledge flows into the next drafts, so old assumptions do not come back.	What the evidence supports; what changes; what to stop

How to judge any system, including ours. Follow one task through it. Can you see how the research informs the page, where a person checks the work, and how a buyer's question reaches a later improvement? Include the cost of maintaining the experience as well as buying the software. An extra feature is useful only when it solves a difficulty your team actually has.

If you would like to see how we run one campaign this way inside WitFlow, you are welcome to ask us at witflow.co.

6. Anti-patterns: what not to do

Anti-pattern	Why it fails	Do this instead
Gating educational content	Turns access into fake intent and stops knowledge reaching the hidden buying group	Publish the answer openly. Keep forms for meetings, proposals, tailored assessments, private accounts, event places, personal responses and secure saved results
Fake ungating	Showing the page but hiding the result until an email or call ("we'll send your results") breaks the promise at the last step	Show the result on screen. Offer an emailed copy as a separate option
Mass cold blasts	One broad list, one message, many people. Irrelevant outreach makes buyers avoid the supplier	One micro-segment, research for relevance, value in the message, volume a person can review
"Free audit" bait	An audit offered as a hook for a meeting, with the useful part held back, or a generic link sent cold to people who never asked. Many teams will not open external links from strangers	If you offer an audit, make it a real open tool with a useful result and no form. In cold messages, put one useful finding or idea in the email itself
Feature-led messages	Talks about what you built, not the problem the reader has	Lead with the buyer's problem and one thing they can use today
Click-to-get asks	The reader must click before receiving anything, which postpones the answer	Teach the idea in the message or post. Make the link optional
Demo request straight after a download	Asks for a sales conversation before the person has read the result	Let them use it. Make a route back easy when they reach a question they cannot answer
Personalisation as decoration	First name and company name wrapped around the same pitch	Personalise the help: the example, the resource, the reason for contact
False intimacy	"I noticed you were researching..." when you have no sound basis. Reveals unexpected monitoring	Refer only to public facts or what the person chose to share
Interpreting silence as permission	Escalating, more personal follow-ups damage trust with people who will never buy	Set sequence limits before launch. Stop cleanly
Lead scores treated as readiness	One number hides identity, fit, interest and intent	Keep the evidence and its uncertainty visible
Vanity metrics	Form fills, impressions, follower counts, a single favourable AI answer, a PageSpeed score or a one-off citation screenshot presented as demand	Use the five evidence levels and tie them to commercial results over a realistic period
More content as the answer	AI makes it easy to publish more of the same uncertainty. Google's spam policies name scaled content abuse	Improve the source before multiplying pages. Fill gaps, merge repeats

Anti-pattern	Why it fails	Do this instead
Every channel on its own score	Advert, page, outreach and sales each tell a different story	One brief, one mission, one owner of the whole route
Reports with no decisions	The dashboard is reviewed and nothing changes	End every review with a decision, an owner and a review date
Moving the goalposts	Changing the success measure until the result looks good	Agree measures and the review period before launch
Using the philosophy to justify endless spending	"Giving" without commercial judgement	Agree a spending limit and conditions to pause, repair or stop
Sending every kind of email from one mailbox	Cold outreach, event invitations and press pitches share one reputation, so a problem in one affects all	Keep cold outreach separate from the mailbox you use with customers and partners, and keep volumes low enough to review

7. The formula on a page

THE GIVE, DON'T ASK FORMULA

The idea: Help buyers before you ask them to buy.

Why it matters

- Buyers learn on their own first, with search, AI assistants and colleagues.
- A form fill is not intent. Gating turns access into fake demand and hides the real buying group.
- More activity only makes more noise. Marketing works like a symphony when every channel plays from the same score.
- Being found is not enough. You need to be understood, recommended and chosen.

The method: four kinds of work, in a loop

- **UNDERSTAND.** One buyer, one problem, one mission. *Leave with:* the problem, its evidence and a clear mission. *Watch:* how many of the people you reach fit the mission.
- **GIVE.** An open answer or tool people can use without a form. *Leave with:* help that works even for people who never buy. *Watch:* how many people reach the promised result and can use it.
- **CONNECT.** Each channel has one job. Every promise leads straight to the help. Rooms, consented follow-up and human help when the buyer wants it. *Leave with:* a route that keeps its promise. *Watch:* conversations the buyer asked for, and the context they bring.
- **LEARN.** Observation, then decision, owner and review date. Change every affected asset. *Leave with:* a supported decision. *Watch:* time from finding to fix.

Then return to understand. The learning changes the next campaign.

The rule for forms: ask only when the buyer has chosen something that needs it, such as a meeting, a proposal, a tailored assessment or a place at an event.

Measure five levels: usefulness, buyer progress, intent, conversation, commercial result.

Never: gate, blast, bait, or count vanity.

Start small: one campaign, 30 days, one owner of the whole route.

Keep in mind: "The machine provides capacity, while people provide judgement."

8. Sources and notes

The book

Carlos Justino, *Give, don't ask: Give away your best knowledge and become the obvious choice* (2026). The method, the four kinds of work, the campaign score, the templates marked "from the book" and all quotations come from it. The fictional characters Maya, Nina, Sam and Ravi come from the book. The software house, insurance company, landing page and website audit stories are anonymised accounts from Carlos's own work, as the book tells them.

Research cited in the book

- Gartner, sales survey finding that 61 per cent of B2B buyers prefer a rep-free buying experience, June 2025 (survey of 632 buyers, August and September 2024). Also the source for the findings on website and sales inconsistency and on irrelevant outreach.
- 6sense, B2B buyer experience report, 2025 (nearly 4,000 buyers). Preference and research before seller contact; LLM use alongside vendor material.
- Edelman and LinkedIn, B2B thought leadership impact report, 2025. Expert content used by stakeholders outside the seller's visible contacts.
- John Dawes, the 95-5 rule, LinkedIn B2B Institute and Ehrenberg-Bass Institute. A planning principle; the proportion varies by market.
- Cognism and Refine Labs, practitioner accounts of open content and demand creation, capture and conversion. The book credits them as prior practice: "The name does not mean I invented giving value, demand generation or coordination between marketing and sales."
- Michelin, history of the Michelin Guide.
- Google Search Central, AI features and your website; spam policies for Google web search.
- Bing Webmaster Tools, AI Performance documentation.
- Information Commissioner's Office (UK), guidance on storage and access technologies and on business-to-business marketing.

Survey findings describe the buyers surveyed. They do not show that one marketing method causes a sale. Check current platform documentation and the rules that apply to your market before you implement anything.

WitFlow's own experience

Section 1.6 summarises WitFlow's own outbound test in September 2026 and the workshops in London and Manchester. It is a qualitative lesson from a small sample, not a benchmark.

Licence

Share this playbook freely and use the templates in your own work. Please keep the attribution to Carlos Justino and the book.

WHEN A CONVERSATION WOULD HELP

Bring one campaign. Let's look at it together.

If you would like help applying the method to your own work, book a session with Carlos Justino. Bring a campaign, a buyer question or a resource you want to improve.

Book a session with Carlos in Google Calendar

Choose a time that works for you. The playbook is yours to use either way.

The machine provides capacity, while people provide judgement.

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