

## The Harbor Guide Method

### Chapter 2 Handout

#### Relating — Quick Reference

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##### The Purpose of Relating

Relating establishes trust, which makes every other sales skill usable.

Relating is always active.

It does not end when discovery begins.

Relating reduces risk so progress can happen.

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##### What Relating Is (and Is Not)

Relating IS:

Intentional

Trust-building

Buyer-centered

Calm and controlled

Respectful of time and preferences

Relating IS NOT:

Small talk without purpose

Rapport for rapport's sake

Avoiding business conversations

Rushing toward an order

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##### The Harbor Guide Mindset

A Harbor Guide:

Reads conditions before acting

Guides rather than pushes

Protects trust before speed

Adjusts based on readiness

Inside Sales Consultants guide conversations—not force sequence.

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##### Trust Formula

**Trust = Credibility + Empathy**

Credibility Signals:

Preparation

Accuracy

Follow-through

Clear explanations

Appropriate use of data/tools

Empathy Signals:

Listening without interrupting

Acknowledging constraints

Respecting preferences

Matching pace and tone

Asking permission

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##### The Captain's Briefing (Relating Version)

Use early and often.

Purpose

*Why you are reaching out for them*

Process

*What will happen in the next 1–3 minutes*

Payoff

*What they gain (clarity, value, reduced risk)*

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##### First Call Priorities

Your goal is not to sell.

Your goal is to earn the next conversation.

Focus on:

Introductions

Permission

Preferences

Observations

Clear next step

If discovery or ordering emerges naturally, proceed—but never force it.

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##### Language Standards

Avoid:

“Just checking in”

“Touching base”

“Circling back”

Use:

“I'm reaching out with a quick idea...”

“I wanted to introduce myself and understand how you prefer to work...”

“Would it be alright if I asked a couple questions?”

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##### Guiding Principle

Never sacrifice trust for speed.

Speed earned through trust lasts longer.

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##### Relating Checklist (Mental)

Before ending the call, ask yourself:

Did I earn permission?

Did I listen more than I spoke?

Did I respect preferences?

Did I leave a clear next step?

**Captain's Briefing — Relating Worksheet**  
(Complete before or immediately after contact)

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**Account Name:**

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**Contact Name / Role:**

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**Captain's Briefing**

**PURPOSE**

Why am I reaching out *for this customer*?

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**PROCESS**

What will I do in the next 1–3 minutes?

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**PAYOFF**

What does the customer gain from this interaction?

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**Credibility Plan**

What will demonstrate preparation and competence?

(Check all that apply)

- Reviewed account/order history
- Reviewed category or trend data
- Prepared relevant product info
- Confirmed inventory / availability
- Clear follow-up plan

Notes:

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**Empathy Cues to Listen For**

(Select or write what applies)

- Time pressure
- Cash flow concerns
- Inventory risk
- Staffing challenges
- Prior frustration
- Skepticism
- Curiosity

Notes:

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**Buyer Preferences (Document and Respect)**

Preferred contact method:

Phone  Email  Text

Preferred timing:

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Communication style notes:

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**Observations (Internal Use Only)**

What did I notice about this buyer?

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**Next Step (Must Be Clear)**

What happens next—and when?

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**Post-Call Reflection**

Did I earn permission?

Did I reduce risk?

Did I leave trust intact or stronger?

One thing to improve next time:

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**Reminder**

**Relating never stops. It adapts.**