

The Harbor Guide Method

Chapter 3 Handout

Discovery — Quick Reference

DISCOVERY QUICK GUIDE

Discovery Is Not an Event - Discovery is a habit.

You are not trying to learn everything in one call. You are building an accurate, evolving understanding of a customer's business over time. Every discovery interaction should aim to:

- Reduce uncertainty
- Increase clarity
- Strengthen trust
- Set a sensible next step

Even a **30-second discovery moment** can move the relationship forward.

The Discovery Mindset

We don't interrogate — we chart.

Your role is not to prove knowledge or push product.

Your role is to understand *today*, explore *next*, and help the customer move safely between the two.

Two Ears. One Mouth.

If you're talking more than the customer, discovery is not happening.

The Core Discovery Frame

TODAY → NEXT

TODAY

- What is true right now?
- What's working?
- What's frustrating?
- What constraints exist (time, money, staffing, inventory, risk)?

NEXT

- What do they want to improve or protect?
- What does "better" look like?
- What change feels acceptable right now?

If **today and next are the same**, your role is service and protection.

If **today and next are different**, discovery guides progress.

Permission Comes First

Before asking discovery questions, ask permission.

Permission:

- Builds trust
- Lowers resistance
- Signals professionalism

Examples:

- "Mind if I ask one quick question so I don't waste your time?"
 - "Before we place this, can I ask what you're trying to accomplish this week?"
 - "Can I ask a quick clarifying question to make sure I've got this right?"
-

Discovery Question Types (Use as Needed)

Fact-Finding

- What is happening?
- How does it work today?
- When does this usually change?

Feeling-Finding (Professional)

- How do you feel about where this is today?
- What's been frustrating?
- What matters most when you bring something new in?

Best / Least

- What's working best?
- What's working least?
- What do you never want to deal with again?

Magic-Wand (Used Sparingly)

- If you could change one thing right now, what would it be?
 - If this month goes really well, what's different?
-

Checking

- "Did I get that right?"
 - "Let me make sure I'm understanding..."
-

Signals to Listen For — BUOYS

You don't need customers to explain their motives clearly.

They reveal what matters through **signals**.

When you hear one, **pause, clarify, and capture it**.

B — Budget & Balance

Signals about cost sensitivity, inventory risk, or margin pressure

"I can't sit on inventory."

"Cash is tight."

U — Urgency

Real timing pressure (not manufactured)

"I need this for next week."

"Menu change is coming."

O — Ownership & Authority

Who decides, who influences

"I have to run this by the owner."

"Our bar manager handles that."

Y — Yes / Yet

Hesitation or friction

"I like it, but..."

"That sounds good, I just..."

S — Specificity

Energy increases, details appear

Named brands

Specific guest types

Past wins or failures

Specificity = importance

Motives (Handled Professionally)

Common Business Motives

- Profitability
- Cost control
- Quality & consistency
- Simplicity
- Risk mitigation
- Reduced effort

Human Motives (Observed, Not Exploited)

- Control
- Recognition
- Approval
- Respect

Professional rule:

We align recommendations responsibly.

We do not manipulate emotions.

Buying Roles (Never Assume)

Roles vary by account:

- Owner-operators
- Managers empowered by ownership
- Bartenders with buying authority
- GMs, bar managers, sommeliers

Always ask:

"Who else weighs in on this?"

Discovery Agreement (Close the Loop)

Before ending a discovery interaction:

1. **Summarize**
2. **Confirm accuracy**
3. **Set a next step**

Example:

"So today you're doing ____, and next you're aiming for ____, without adding complexity or risk. Did I capture that correctly?"

This prevents misunderstandings and builds trust.

Captain's Briefing — Discovery Worksheet

Account Name:

Contact Name / Role:

1. TODAY — Current Situation

(What is true right now?)

- _____
- _____
- _____

2. NEXT — Desired Direction

(What are they trying to improve or protect?)

- _____
- _____

3. GAP NOTES

(What's standing between today and next?)

- _____
- _____

4. SIGNALS OBSERVED (BUOYS)

B — Budget & Balance:

U — Urgency:

O — Ownership & Authority:

Y — Yes / Yet:

S — Specificity:

5. MOTIVES IDENTIFIED

(Check all that apply)

- Profitability
- Cost Control
- Quality / Consistency
- Simplicity
- Risk Mitigation
- Reduced Effort
- Control
- Recognition
- Approval
- Respect

Notes:

6. BUYING ROLES

Primary Decision Maker:

Influencers / Stakeholders:

7. CUSTOMER PREFERENCES

Preferred contact method:

Call Text Email

Best time to reach them:

8. NEXT STEP AGREED

Action:

Owner:

Timing:

9. CRM CAPTURE CHECK

Today documented

Next documented

Signals captured

Roles noted

Next step scheduled

Final Reminder

You do not “complete” discovery.

You **maintain** it.

Small, consistent discovery moments create:

- Better recommendations
- Fewer mistakes
- Stronger relationships
- More trust over time

We don't interrogate.

We chart.