

## The Harbor Guide Method

### Chapter 4 Handout

#### Advocating — Quick Reference

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##### The Purpose of Advocating

Advocating is how you turn what you learned into forward motion. You are not pushing — you are helping the customer decide.

Your job is to:

- Reduce risk
- Create clarity
- Invite action

Momentum is the goal.

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##### The Advocate's Bridge

Every strong recommendation includes:

###### 1. Situation

What is true right now in their business.

###### 2. Path

What you suggest based on what they told you.

###### 3. Outcome

What improves if they move forward.

##### Example:

"Because you're focused on keeping inventory lean (situation), trying a small rotation instead of a full reset makes sense (path) so you stay flexible while still offering something new (outcome)."

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##### The Three Questions You Must Answer

###### Do they feel understood?

Reflect what you heard:

- "What I'm hearing is..."
- "It sounds like..."
- "So the biggest concern is..."

###### Does this feel safe?

Lower risk by:

- Matching products to how they operate
- Avoiding over-commitment
- Offering small, reversible steps

###### Do they know what happens next?

Always suggest a clear next step.

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##### The Decision Ladder

Not all "yeses" are equal.

- Curiosity Yes
- Trial Yes
- Expansion Yes
- Program Yes
- Relationship Yes

Your job is to help them climb — not jump.

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##### Reading Buying Signals

When customers ask:

- "How would that work?"
- "Could we try...?"
- "What do most places do?"
- "What are my options?"

They are ready to decide.

Slow down. Guide them.

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##### How to Invite Action

Use respectful, natural language:

- "Does it make sense to try this?"
- "Would you like to move forward?"
- "Should we line this up?"
- "What feels like the right next step?"

No pressure.

Just clarity.

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##### What Winning Looks Like

A good call ends with:

- An order
- A trial
- Or a scheduled next step

Momentum is success.

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# Captain's Briefing — Advocating Worksheet

Use this before or after each call.

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## 1. What did I learn?

Customer's situation today:

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What they want next:

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What's in the way (risk, fear, limits):

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## 2. Build the Advocate's Bridge

Situation (their words):

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Path (what I'll recommend):

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Outcome (why it helps them):

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## 3. What signals did I hear?

(Check all that apply)

- Asked how it works
- Asked about options
- Asked about price or timing
- Asked what others do
- Asked about next steps

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## 4. What type of Yes am I aiming for?

(Check one)

- Curiosity
- Trial
- Expansion
- Program
- Relationship

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## 5. My invitation

(How I will ask)

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## 6. What is the next step we agreed on?

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Date / time (if scheduled):

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## 7. Post-Call Reflection

Did they feel:

- Seen
- Curious
- Ready

Did we move forward?

- Yes
- No

What did I learn for next time?

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