



Relastrat
Relationship Strategies

THE WORKBOOK COMPANION

Onboarding Guide

What to expect, what to bring, and why it's worth the dig.

25–30 minutes Four chapters Save & resume Editable forever

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A companion to the Relastrat white paper

Before you fill out a single field, here is what you are actually doing.

You are about to write down what your business actually is — in technical detail, in your own language, past the marketing pitch. Most operators have never done this comprehensively. Almost none have done it with the discipline a cross-industry matcher requires.

The output is something called a capability profile: a structured, editable document the platform reasons over every time you run a discovery scan. The richer that profile, the sharper the hidden-market adjacencies the AI surfaces afterward. Every minute you invest in the interview compounds across every scan you ever run.

This guide exists so you arrive prepared. Roughly 25 to 30 minutes from start to a synthesized profile you can review. Four chapters. Save-and-resume between sessions. AdaptGent — the in-app assistant — on every page if you get stuck.

THE PRINCIPLE

Specificity is the entire game. Model numbers beat descriptions. Real customer revenue beats vague tier-talk. Honest surprise-use stories beat polished case-study prose. The interview rewards specificity with sharper discoveries — every single time.

How to use this guide

- **Read first** — Skim the four chapter previews so you know what is coming.
- **Gather second** — Use the pre-interview checklist to gather materials before you sit down. Print it if that helps.
- **Reference during** — Keep this open in another tab during the interview. Each chapter section here mirrors a chapter in the wizard.
- **Iterate after** — Your profile is editable forever. First pass is good enough; refinement makes it great.

The capability profile, end-to-end.

Four chapters of guided interview produce a single structured artifact: your capability profile. Here is the time budget and what each chapter contributes.

#	Chapter	Time	What it captures
01	What You Actually Do	~7 min	The mechanism behind the business — past marketing, into physics, chemistry, software, or process.
02	Who You Serve Today	~6 min	Real customers, real deals, real wins and losses. Ground truth for the matcher.
03	Adjacent Problem-Space	~10 min	The most valuable chapter. Surprise uses, core verbs, AI-proposed adjacencies.
04	Operational Fit	~3 min	Geography, capacity, lead times, sweet-spot. Decides which discoveries are actionable.

After the four chapters, AdaptGent synthesizes the answers into the structured profile. Plan about 5 additional minutes to review it before locking it in. Total start-to-finish: 30 to 35 minutes. The profile remains editable forever — first pass is good enough to start running scans.

GOOD TO KNOW

You do not need every detail below ready before you start. The interview auto-saves continuously and resumes wherever you left off. Sit down whenever you have a quiet block — the wizard will catch you up.

The master checklist.

Have these handy and the interview moves quickly. Print this page or keep it open while you gather. Anything you don't have ready, skip — the wizard saves continuously and you can come back to fill it in.

What you actually do

- Equipment list** — Model numbers, materials, processes, software stacks, throughput specs.
- Credentials** — Certifications, licenses, and accreditations with their issuing bodies (FAA repair-station number, ISO scope + registrar, NADCAP, A2LA, state license #s).
- Intellectual property** — Granted or pending patent numbers, plus any proprietary processes or trade secrets worth noting.
- Plain-English pitch** — A one or two sentence description of what you do in plain language — no industry jargon.
- End-to-end walkthrough** — A walkthrough of a typical job or sale, end to end. What does the customer arrive with, and what do they leave with?

Who you serve today

- Customer roster** — Five to ten recent customers — company name, their industry, what they bought, approximate annual revenue. Never displayed externally.
- Best-win stories** — Two or three you-won-them stories — problem, why they picked you, what closed the deal.
- Lost-deal reasons** — Two or three you-lost-them stories — why they went elsewhere or churned.
- Anti-customer list** — Any markets you have explicitly decided not to sell to — export-controlled, ethics-incompatible, geographies you avoid.

Adjacent problem-space

- Surprise-use stories** — Any time a customer used your product or service for something you didn't expect. Often the single highest-value answer in the interview.

Core verbs — Strip away the industry. What does your mechanism actually do in verbs? (Removes, joins, separates, detects, transports, cleans, transforms, measures, predicts...)

Untouched dream — If capacity and capital weren't obstacles, what industry would you most want to break into? Why haven't you?

Operational fit

Geography — Geographic reach — service radius, ship-anywhere, regional, on-site only?

Capacity — Jobs per month you can handle, max single-deal size, capacity floor and ceiling.

Lead time — Typical lead time from first inquiry to delivery.

Sweet spot — Your sweet-spot customer — size, industry, deal size, urgency. The kind you can do all day.

Optional, but powerful

Documents to upload — Sales decks, product brochures, granted patents — PDF up to 25 MB each. AdaptGent parses them and folds the content into the synthesis.

Website URL — Company website URL — the wizard reads it to pre-fill answers.

WHY THIS MATTERS

Generic capability profiles produce generic adjacencies. Specific profiles — with model numbers, certification IDs, real customer revenue, and honest surprise-use stories — produce specific, defensible discoveries. The interview is where the platform's accuracy is set.

CHAPTER 01 What You Actually Do ~7 min

Past the marketing speak. The wizard wants the mechanism — the physics, chemistry, software architecture, biological process, or operational system at the heart of your business. The matcher will reason over this answer more than any other.

Questions you will see

Company name.

Website URL — optional. The wizard reads it to pre-fill later answers.

Describe what you do in one or two sentences. Plain words, no industry jargon.

Go deeper. What is the underlying mechanism — the physics, chemistry, software architecture, biological process, or operational system that makes your product or service actually work?

Walk us through a typical job, product, or sale end-to-end. What does the customer arrive with, and what do they leave with?

What equipment, tools, materials, or technology stack does this require? Be specific — model numbers, specs, software, materials, methodologies.

Certifications, licenses, accreditations, or formal qualifications you hold (with issuing body).

Patents (granted or pending), trade secrets, or proprietary processes. Include patent numbers.

Have a sales deck, product brochure, or granted-patent PDFs? Drop them here — the wizard parses them and folds content into the profile.

HIGHEST-LEVERAGE QUESTION

The mechanism question is the single most important field in the entire interview. Don't write what your website would say. Write what an engineer in your shop would say if you asked them to explain how the thing actually works.

Common pitfalls

- **Marketing language** — Stops at the elevator pitch. AdaptGent will follow up — go past the pitch on the first pass.
- **Vague specs** — "Industrial cleaning" matches everything; "pulsed-fiber laser ablation, 1064 nm, sub-micron contamination removal" matches the right things.
- **Skipping certifications** — If you have ISO 9001 or AS9100 certifications, name them with registrar and scope — that becomes a filter in the matcher.

CHAPTER 02 Who You Serve Today ~6 min

Real customers, not personas. Names, industries, what they bought, and the story of how each sale happened. This becomes the seed pattern the matcher uses to find more like them — and to learn where you don't fit.

Questions you will see

List 5 to 10 representative current or recent customers. The more honest, the better — we'll never display this to anyone. (Per row: company, industry, what they bought, approximate annual revenue.)

Pick your 2 to 3 best customer wins. For each: who were they, what problem did they have, why did they choose you over alternatives, and what made the sale happen?

Think of 2 to 3 deals you lost or customers who left. Why did you lose them?

Who shouldn't you sell to? Markets you've explicitly decided to exclude — export-controlled industries, ethics-incompatible work, capacity ceilings, geographies you won't serve.

LOSSES ARE SIGNAL

Lost-deal answers are as valuable as won-deal answers. "We were too expensive" tells the matcher you fit premium segments. "We couldn't hit their lead time" tells the matcher to weight capacity over breadth. Honesty here sharpens every future scan.

Common pitfalls

- **Skipping revenue** — Best customer revenue numbers help the matcher size opportunity. Even "about \$80K" is enough.
- **Inventing archetypes** — Skip the persona thinking. Real company names — "Simmons Food Manufacturing" — anchor the matcher to actual industries.
- **Hiding anti-customers** — Surface them. "Anyone who needs FDA traceability and can pay our rates" rules out half the noise.

CHAPTER 03 **Adjacent Problem-Space** ~10 min

The most valuable chapter, and the one most worth slowing down for. This is where the cross-industry insight is mined. The same mechanism that solves your customer's problem solves other customers' problems too — they just don't know it, and until now, neither did you.

Questions you will see

Have you ever had a customer use your product, service, or technology for something you didn't expect? Tell those stories.

Strip away the industry context. At its core, what does your mechanism actually DO? Think in verbs: removes, joins, separates, detects, transports, cleans, transforms, measures, predicts.

AdaptGent will propose 5 to 7 adjacent industries where your mechanism might solve a problem they face today. For each, tell us: 'we already serve this', 'never thought of it', 'wouldn't fit because...', or 'tell me more'.

If capacity, capital, and connections weren't an obstacle — what industry or use-case would you most want to break into? Why haven't you?

THE GOLD

A single honest surprise-use story has more matcher value than any other field in the entire interview. The Aviation Laser Services + Simmons Food story (the founding moment of Relastrat) is exactly the kind of answer this question is built to capture. If you have one, tell it in full detail.

Tips for the highest-value answers

- **Include the "weird inbounds"** — Even an off-handed lead from a trade show counts. Capture it.
- **Verbs over nouns** — "Removes organic contamination without solvents" matches more industries than "laser cleaning".
- **Don't be polite to the AI** — "Wouldn't fit because..." is just as useful to the matcher as "tell me more". Both train it.

Common pitfalls

- **Treating this like the others** — Rushing means you generate good surface adjacencies and miss the breakthrough ones. Slow down.
- **Staying inside your industry** — Speak the mechanism cleanly and the matcher generalizes. Speak the industry and it doesn't.

CHAPTER 04 **Operational Fit** ~3 min

The boring-but-critical chapter. Without these answers, every adjacency the platform surfaces is theoretical — interesting on paper, useless in practice because we can't tell which ones you can actually serve.

Questions you will see

Geographic reach. Where can you actually serve customers? On-site only? Ship-anywhere? Regional? Be specific about radii or shipping zones.

Capacity. Jobs per month, customer count you can handle, max single-deal size. What's your floor and ceiling?

Typical lead time from first inquiry to delivery.

Describe your sweet-spot customer: size, industry, geography, deal size, urgency. The customer that's profitable, repeatable, and you can do all day.

DEFINE YOUR SWEET SPOT

Sweet-spot is the chapter's most valuable answer. It is what every future scan is optimized for. "Mid-Atlantic aerospace OEMs, \$50–150K projects, 4–6 week lead time" tells the matcher exactly what to elevate and exactly what to bury.

Common pitfalls

- **Refusing to specify limits** — "We can do anything" produces "we will match you to everyone". Constraints sharpen results.
- **Glossing over lead time** — The number is the matcher's input. Even "2–4 weeks typical, 8 weeks for custom" is enough.

The synthesis — what AdaptGent produces.

When the four chapters are complete, AdaptGent reads everything you wrote — including any PDFs or website content you uploaded — and synthesizes a structured capability profile. Plan about 5 minutes to review it.

What the profile contains

- **Plain-English description** — A clean restatement of what you do, ready to feed every future scan.
- **Capabilities list** — Tagged and normalized so the matcher reasons over them as filters.
- **Equipment + certifications** — Including issuing bodies, used as eligibility gates for safety-critical adjacencies.
- **Industry + location labels** — Tagged with the industries the matcher will compare against new opportunities.
- **Operational constraints** — Encoded as geographic and capacity gates on every discovery.

Review it carefully

AdaptGent is good but not perfect. On the review screen you can edit any chapter, re-run synthesis, and approve when the profile reflects what you actually do. Don't rush this step — an incorrect capability or industry tag will steer the matcher into the wrong neighborhood.

FIRST PASS IS GOOD ENOUGH

The capability profile is a living document. You can edit any chapter at any time after approval. Every revision feeds the next scan. The first pass just needs to be good enough to start running scans — not perfect.

Your first discovery scan, demystified.

Once the profile is approved, every discovery scan from this point forward runs in seconds. On the Free tier you'll see five hidden-market matches with blurred contacts and actions. Upgrade tiers reveal full contacts, second-pass research, AI-drafted outreach, and the AdaptGent assistant on every page.

How to read a discovery

- **Match strength** — How precisely the candidate's stated need maps to your actual capability profile.
- **Revenue potential** — A realistic annual revenue range based on industry comparables and engagement size.
- **Demand strength** — The volume, recency, and quality of evidence under the match.
- **Evidence type** — Patent, RFP, Job, Forum, or Event — each carries different weight in the scoring.

What to do with a discovery

- **Research deeper** — On the discovery, triggers a second pass: more evidence, longer-form analysis, ready-for-sales brief. Starter+ tier.
- **Draft outreach** — AI-drafted email referencing the specific evidence that produced the match. Sent + tracked. Pro tier.
- **Move to pipeline** — Move it into the kanban pipeline. Drag through Researching → Outreach → Engaged → Converted.
- **Archive** — If it really doesn't fit, mark it dismissed and the matcher learns to bury similar candidates.

WHERE TO START

Don't try to act on all five discoveries at once. Pick the one with the strongest match score AND the most recent evidence. Run Research Deeper on that one. That's the shortest distance from sign-up to a real conversation.

Honest answers to the questions everyone asks.

Q. How long does this really take?

About 25 to 30 minutes for the four-chapter interview, plus roughly 5 minutes to review the AI-synthesized profile. Total start-to-finish, 30 to 35 minutes. Save-and-resume between sessions if you can't do it in one block.

Q. Do I have to finish in one sitting?

No. Every answer auto-saves. You can close the tab, come back the next day, and pick up exactly where you left off. The wizard remembers.

Q. What if I don't have my model numbers or certification IDs handy?

Skip those fields and keep going. The interview is editable forever — once you find the specifics, you can drop them in and re-run synthesis. First pass just needs to be good enough to start running scans.

Q. Can I change my profile later?

Yes. The capability profile is a living document. Edit any chapter from the profile screen, re-run synthesis, and every future scan reads the updated version.

Q. Does Relastrat show my customer list to anyone?

No. Your customer roster is matcher input only — never displayed externally, never shared across tenants, never used for any other purpose. We need it to learn your real seed pattern; we don't need it for anything else.

Q. What is a "surprise-use story" and why does it matter so much?

Any time a customer used your product or service for something you didn't expect. These stories are the highest-signal answers in the entire interview because they expose latent cross-industry demand directly — exactly what the matcher is built to find more of.

Q. Can I upload sales decks and patents?

Yes — PDF up to 25 MB each. AdaptGent parses them and folds the extracted content into the synthesis. Granted patents in particular dramatically sharpen the matcher because they name your mechanism in technical vocabulary.

Q. What happens if AdaptGent gets my profile wrong?

On the review screen, edit any chapter and re-run synthesis. AdaptGent learns from your edits; subsequent passes converge on a profile that reflects what you actually do.

When you are ready,
pour your business onto the page.

Sign in, click "Start the interview", and tell the wizard what your business actually is. Save-and-resume any time. AdaptGent is on every page if you get stuck.

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