



PURPOSE: This tool will help you navigate the 8-Step Consultative Conversations you have with your clients, from planning to securing the next step.

Company: _____

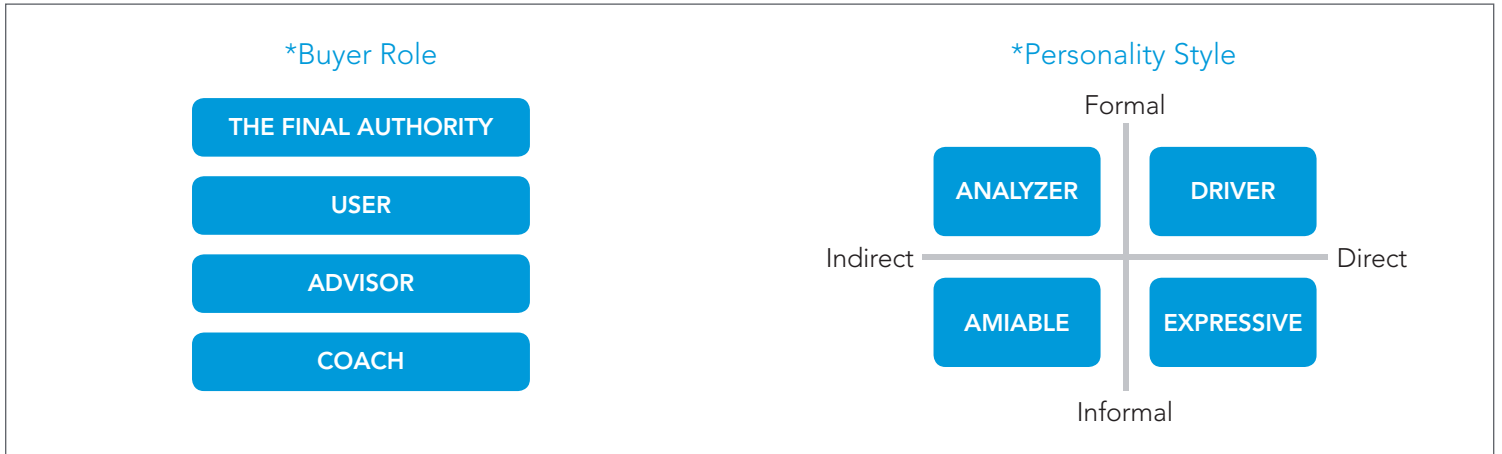
Date: _____

Contact Name: _____	Contact Title: _____
Buying Role*: _____	Personality Style*: _____
<input type="checkbox"/> First Meeting <input type="checkbox"/> Regular Review <input type="checkbox"/> Proposal Meeting <input type="checkbox"/> Secure Sale <input type="checkbox"/> Other _____	

8 Step Consultative Selling	Record notes while in meeting with your customer
Step #1 – Build Rapport What will you say to "connect"? What is their Personality Style?	
Step #2 – Establish Context What is the purpose/agenda of this meeting?	
Step #3 – Confirm amount of time for this meeting Gain agreement to participate Consultative Approach vs. Sell & Tell	
Step #4 – Consultative Investigation GREAT Questions you will ask	
Step #5 – Summarize & Prioritize Key notes of importance	
Step #6 – Explore Solutions What are the solutions you can offer?	
Step #7 – Quantify Benefits & ROI Impact Cost benefit/ROI	
Step #8 – Secure Go Forward Commitment What are the next steps? Actions to be taken by the client and myself? Secure Sale/Next Meeting with Call Date & Time	
Rate this Opportunity: <input type="checkbox"/> HOT <input type="checkbox"/> WARM <input type="checkbox"/> LUKE WARM	

Source: CPSA 8 Step Consultative Selling

Who are you meeting with? According to buyers, less than 2% of salespeople prepare for a customer meeting.



Research the buyer, company and industry (Website, Google, LinkedIn). Existing Clients: Are there any past sales, volume or products purchased from your company?

Customized Unique Value Proposition - How will you customize your UVP for this client to make it more benefit oriented to them?

Questions - What questions would you like to ask to better understand their Decision Making Criteria, their needs and their goals/ideal situation?

Expected Outcome of this Meeting - What is your "1 year" strategy and outcome for this customer?