

PURPOSE: Turn product conversations into purposeful business conversations using the 8-steps of consultative selling.

Company: _____

Date: _____

Contact Name: _____	Contact Title: _____
Buying Role: _____	Personality Style: _____

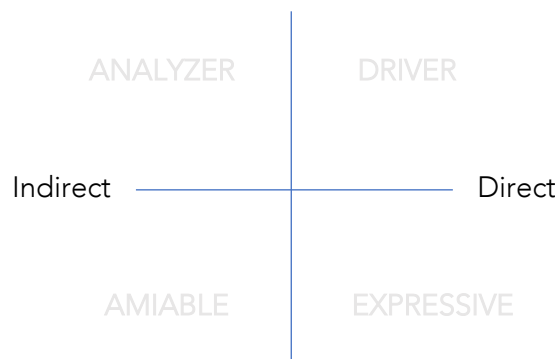
- First Meeting
 Regular Review
 Proposal Meeting
 Secure Sale
 Other _____

Potential Revenue: _____

8-Steps of Consultative Selling

Step #1 – Build Rapport <ul style="list-style-type: none"> - What will you say to “connect”? - What is their Personality Style? 	
Step #2 – Establish Context <ul style="list-style-type: none"> - What is the purpose/agenda of this meeting? 	
Step #3 – Gain Agreement to Participate <ul style="list-style-type: none"> - Confirm the amount of time for this meeting 	
Step #4 – Consultative Investigation <ul style="list-style-type: none"> - GREAT Questions you will ask about their business, goals and challenges 	
Step #5 – Summarize & Prioritize <ul style="list-style-type: none"> - Key notes of importance 	
Step #6 – Explore Solutions <ul style="list-style-type: none"> - What are the solutions you can offer? 	
Step #7 – Quantity Benefits & ROI Impact <ul style="list-style-type: none"> - Cost benefit/ROI 	
Step #8 – Secure Go Forward Commitment <ul style="list-style-type: none"> - What are the next steps? - Actions to be taken by the client and myself? - Secure Sale/Next Meeting or Call Date & Time 	
Rate this opportunity: <input type="checkbox"/> Hot <input type="checkbox"/> Warm <input type="checkbox"/> Luke Warm	

PURPOSE: Meeting preparation - who are you meeting with?

Buyer Role	Personality Style
The Final Authority User Advisor Coach	<div style="text-align: center;"> <p>Formal/Logic</p>  <p>Informal/Casual</p> </div>

Research the company and industry (Google, LinkedIn). Gather Sales and Inventory numbers if applicable. Any other information to gather to prepare for this meeting?

Customized UVP – 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 for this account?
