



CONSULTATIVE **SELLING**



How to win bigger, better deals

Consultative selling: how to win bigger, better deals

"If there's a sales person involved in the sales process, there is typically some level of expertise that should go into that conversation. Consultative sales means taking the time to understand what people are trying to do, and that is relatable to any sales process where a human being is involved."

This is a simple and clear description of consultative sales in the real world, according to Sr. Account Executive of Close James Urie.

Curious about consultative selling? Ask yourself: is my presence in the sales process adding value to my customers?

If the answer is yes, then you're on the right track. But if you really want to master this methodology, you've come to the right place.

We're about to dive into exactly what it takes to become a consultative salesperson, and how to implement these strategies into your daily sales workflow.

Here's what you can look forward to:

1: 8 consultative selling process steps to close more deals

Learn how to listen to prospects, educate them, and set them up for long-term success.

2: The consultative sales approach: 10 skills to get started

See key skills and qualities of consultative salespeople, including empathy, curiosity, honesty, and industry expertise.

3: Consultative selling questions: 27 questions + how to ask

Get real examples of questions to show pain points, develop urgency, and prove value.

4: Consultative selling in the real world: 7 examples to learn from

Review real-world insights from the salespeople, sales consultants, and buyers who are in the trenches.

5: 21 consultative sales coaching and training resources to up your game

Find a course or workshop from this list of world-leading consultative sales experts.

If you want to start out with the basics, we'll cover what you need to know:

- ✓ What is consultative selling?
- ✓ How the consultative selling model works
- ✓ Pros & cons of consultative selling

What is consultative selling?

In Consultative selling you become a helpful guide to your potential customers. Instead of just 'selling' a product or service, the consultative sales rep develops a deeper understanding of customer needs and works like an advisor to find the ideal solution.



The term 'consultative selling' was originally coined in 1970, but over time this method has adapted and grown to become a highly effective way of selling, even more than 50 years later.

To define consultative selling, think of what a consultant does. They work alongside a company, discuss challenges and goals, and act as another member of the team working together to reach a set result.

In many ways, consultative selling turns salespeople into active consultants for their customers. They work alongside companies as an extension of the team, digging to the root of key issues and providing solutions and ideas that work. Their focus is on bringing real results to their customers, not just selling a product or service.

How the consultative selling model works

In general terms, the consultative sales methodology follows the same process as a consultant would when working with a client. When applied to the [sales process](#), it could look something like this:

First, **the sales rep asks good discovery questions to find the root of key challenges.**

They'll talk to their point of contact, and probably others on the team to discuss the main issues and find out what's really causing them.

Next, **they'll work collaboratively to find the right solution** to overcome challenges and reach goals. This involves more than just doing a [product demo](#) or giving a [sales pitch](#)—it involves developing a process and plan to work towards goals and see real results.

As they develop a solution, **a consultative seller also provides context, ideas, and insights into top industry trends.** To be successful with this sales model, the rep must be an authority that the customer can respect and trust (i.e., a consultant).

Finally, **the seller closes the deal by giving real proof of the results.** This might include providing social proof, giving a clear product demo that proves the value of the product

for this particular customer, or offering a free trial period to let the prospect experience the benefits of the solution first hand.

Pros & cons of consultative selling

After 50 years, the consultative sales methodology must be doing something right! Here's what you can expect when using it (the good and the bad):

Benefits of consultative selling:

- ✓ **Increased trust in your brand:** With your sellers acting as authorities in the field, they'll increase the confidence that customers have in your brand and company.
- ✓ **Better alignment to the buyer journey and needs:** When the whole sales team is focused on the customer, you'll be able to build a smoother sales process that aligns with what the customers actually want and need (not what you think they need).
- ✓ **Increased close rates, upsells, and cross selling:** Consultative sellers convince buyers based on real value. Plus, they may surface unexpected needs when digging into the real root of the customer's problems. This, when done authentically, results in more closed-won deals and revenue.

Drawbacks of consultative selling:

- ✓ **Takes longer for junior reps to get up to speed:** There is no replacement for experience. Since consultative selling requires reps to be industry experts, it will be harder for junior reps to get started. However, there is a simple hack for junior reps to start doing consultative selling from day 1, even when they don't yet have all the answers.
- ✓ **Saying no to some customers:** Consultative sales reps focus on what's best for the customer, and in some cases that means telling them your product isn't a good fit. In the short term, this will result in some lost business, but in the long

term it will increase trust in your brand and focus your customer base to the people who can really succeed with your product, and drive sustainable revenue.

Dig into the nitty-gritty of consultative selling

Thinking that consultative sales is the right model for your team? If you're interested in helping customers succeed and have a team of industry experts ready to share their knowledge and close high-value deals, then get ready: we're about to drop a load of consultative selling wisdom.

This guide was built to help your team master consultative selling. Learn how the process works, what skills your team will need, examples you can follow, and more. Jump to [Chapter 1](#) to get started.

8 consultative selling process steps to close more deals

When you start selling with a consultative sales process, you embark on a journey with every new customer. You discover their needs, [understand their pain points](#), and walk side-by-side with them as they discover the right solution.

Consultative salespeople are [like a great doctor](#) who takes time to listen to you and prescribes the right solution to the root of your problem, rather than just pushing pills to cover the symptoms.

So, what exactly is involved in a consultative sales process? How do you set it up and get it right from the start?

Here's what we're going to discuss now:

- ✓ Core principles of the consultative sales process
- ✓ Consultative selling process steps & stages

Core principles of the consultative sales process

Before we dive into the 8 steps of consultative selling, let's talk about the principles that form the foundation of this sales methodology:

- ✓ **Authenticity:** You can't fake genuine interest in people. Since much of consultative selling has to do with building relationships and [earning trust](#), making sure that you are [your authentic self](#) during the whole process is key.

- ✓ **Empathy:** When you can put yourself in the shoes of your customers, you'll be better able to relate to them and more motivated to find the right solutions for them. As [revops consultant Marc Belgrave](#) says, "You accrue a percentage of the value you create."
- ✓ **Authority:** To be a successful consultant, you need to have a clear area of expertise that you can share with your clients. Consultative selling is the same—prospects must see you as an expert that they can trust to guide them towards a solution.
- ✓ **Context:** Having full context of the deal, the relationship, and the previous interactions with each prospective customer is a key to building trust. That kind of context requires a [communication-focused CRM](#) that connects with the tools you use for lead generation and data enrichment.

So, how do these principles fit into the consultative selling stages?

Consultative selling process steps & stages

Most B2B [sales processes](#) follow the same basic steps:

- ✓ Get a new lead
- ✓ Introduce them to your product
- ✓ Close the deal

So, following this general pattern, how can you build your own consultative selling process?

Step 1. Learn about your new leads before talking to them

Whether you're doing mainly [inbound or outbound sales](#), research is a key part of starting your consultative selling process.

Start by matching these new leads to your [ideal customer profile](#) (ICP). Do they match the criteria for a successful customer?

But more than that, try to get into their head. The more you talk to your customers, the easier this will be (we'll discuss this in more detail in [Chapter 2 of this guide](#)). Try to understand their business, their perspective, and their motivations.

That said, reps can only be successful if they have the right resources to do in-depth research and truly understand which profiles are more successful customers. That's why well-developed (and regularly updated) sales enablement is a key element of consultative selling.

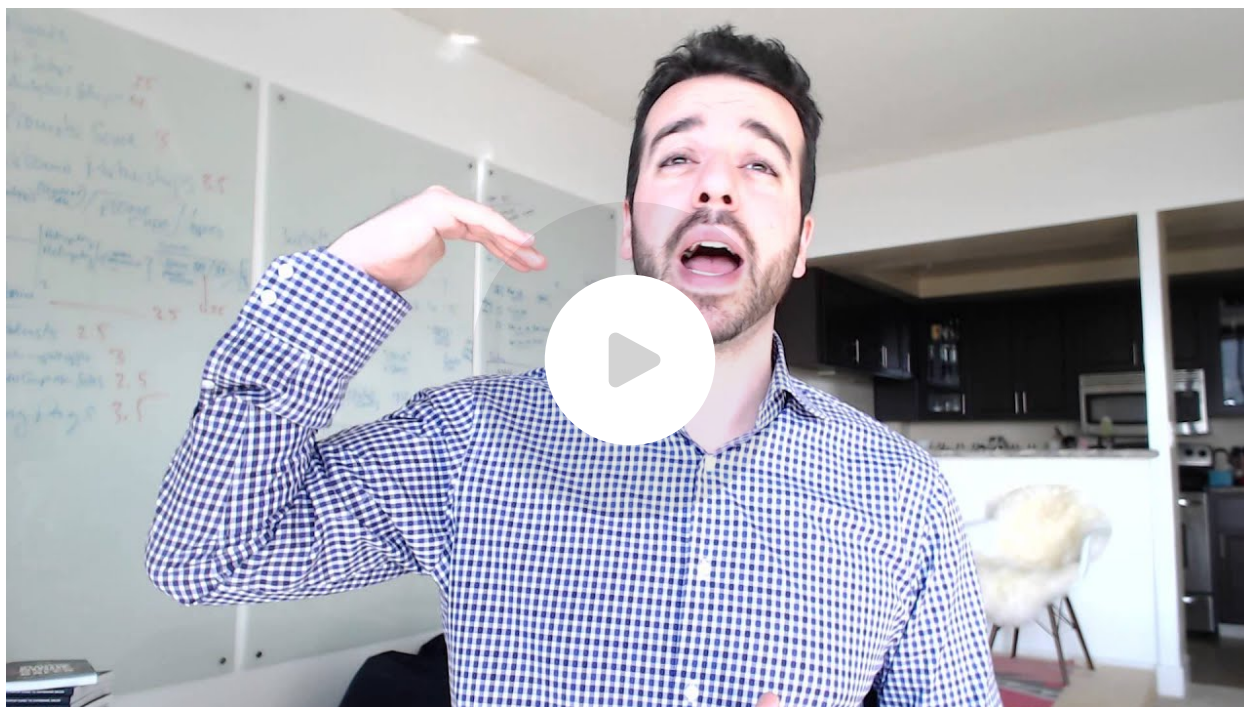
Step 2. Listen, listen, listen

And then listen some more.

This is the main aspect of the consultative sales process, and something every article and guru will tell you to do if you want to start using this model.

But, **how** exactly do you listen better to your potential customers?

First of all, **take the time you need before the call to relax and refocus**. Think about the value you can provide to a potential customer, and set a clear goal for the call to keep it on track.



Once you're on the call, **shut up**. Never, ever allow yourself to [multitask on a sales call](#). When the prospect is talking to you, really listen. Don't worry about what you're going to say next or think about the questions you're going to ask. If you have some questions prepared in advance, you won't have to think about this during the call.

Pro tip: If you have a clear [sales call structure](#) with questions prepared in advance, you won't have to think about this during the call. Jump to [Chapter 3](#) to see what kind of questions a consultative seller should ask.

When the customer finishes talking, **repeat back what they said**. This makes sure you understood their point correctly, and shows them you were really listening to what they were saying.

Another way to listen better is to **use the right tech**. This could be something simple like call recordings in Zoom, or an advanced recording and AI note-taking application like [Fathom](#). The point is—make sure you have a way to go back and reference the conversation, because you probably won't catch everything on the first go.

Step 3. Dig into the root of key pain points

A good doctor doesn't take what you say at face value. They'll ask you questions until they're absolutely sure they know the root of your problem, not just what it appears to be on the surface.

This is exactly what consultative sellers do.

Don't take what prospects say at face value. Dig deeper. [Ask questions](#). Understand the root of the problem, not just the surface pain.

Here are two ways to do it:

- ✓ **Ask open-ended questions:** "Tell me about..." / "Can you talk me through your process for..." / "How is that affecting your team?"
- ✓ **Ask follow-up questions:** "Why is that in particular so important to you?" / "Do you have an example of that for me?" / "What's that look like in terms of [metric]?"

In Chapter 3, we'll dig even deeper into asking the right consultative sales questions.

Step 4. Customize your sales pitch with the insights you've learned

While you may have a [sales pitch](#) template or basic demo framework that you use every time, consultative selling involves personalizing your pitch to what this prospect needs to hear.

You've done a decent amount of discovery by asking good questions and identifying the root causes of this customer's problems. Now, use your pitch to provide a clear solution, not just with the product, but with a workflow and clear guidance.

Here's how this looks in the real world:

When the sales reps at Close get on a demo with a new inbound prospect, they'll take time to dive into the prospect's free trial account in Close and set up a clear workflow with them. The prospect walks away, not just with a sales pitch, but with the guidance and support they need to actually start seeing real benefits from the product they're testing out.

Sr. AE, James Urie, calls this building sticky trials with personalized demos. Check out the video below for more info:



Step 5. Educate your prospects

During the consultative sales process, you'll have a part in educating your prospects and guiding them where they may need help.

Here are three areas consultative sellers will usually educate their prospects:

First, **educate them on the real impact of their challenges.**

Now that you know the main challenges they're facing, help your prospects to think about the financial impact of those problems.

For example, if there's an issue with productivity, how much money is that wasted time causing them? How does low productivity impact their employee retention rates?

Next, **educate them on the root causes of their challenges.**

As an expert, you can see past surface issues and understand what's really causing the problem.

For example, a sales manager may assume that his team is underperforming because their CRM is bad. While this may be partly true, a consultative sales rep may dig deeper and find that the current CRM is full of bad data.

In this case, the root cause of the problem is bad data, not a bad CRM, and simply switching to a new CRM with the same data won't help. It's the job of a consultative rep to educate the customer on why and how to clean up their sales data before trying to sell them on a new CRM.

Finally, **educate them on the possible solutions and the value of those solutions.**

For a consultative sales rep, the right solution doesn't just mean the product you're selling. Solutions involve the processes and workflows being used, as well as the tools they're using.

Maybe a lead doesn't know the possibilities that exist with new software or tools. Maybe they're unaware of certain necessary features to overcome the challenges they're facing. Or maybe they know exactly what they need, but don't fully understand the value of it.

Help prospects put a price tag on the value they're getting. Show them exactly why the solution is worth the money they spend on it. And dive into solutions with them.

Step 6. Solve problems alongside your prospects

The consultative sales process is all about setting your customers up for long-term success, not just 'making the sale'.

I love how Revenue Operations consultant Marc Belgrave put it: "In sales, people think: 'You can sell ice to an Eskimo.' But Eskimos don't need ice. Empathy tells you what the person really needs."

(Psst... [Listen to the whole interview with Marc Belgrave here](#))

A consultative seller acts as an additional member of their customer's team, helping them develop the right workflow and process to succeed.

Step 7. Negotiate and close with a win-win situation

Obviously, a win for your company is a closed deal. A win for your customer is getting a tool or service that will exponentially increase their productivity, revenue, or other essential business metrics.

So yes, win-wins are a feasible result in [sales negotiations](#).

The key is proving to your potential customer that they will win by purchasing your product or service.

We've already discussed one way to do this: help your prospects get the most they can out of their free trial with your product.

But what if you don't have a free trial? Then go to the next best thing: social proof.

Use relevant customer stories to show how similar businesses or teams succeeded with your product or service. Show them results and prove that you know what you're doing.

Step 8. Stay with them until they've seen the solution work for them

A truly consultative sales process doesn't end when the contract is signed. It ends [when a customer finds real value in the solution they've purchased](#).

The salesperson will eventually hand off the new customer to an account manager or customer success rep, but there should be a period of time in between the handoff where the salesperson is still in charge of making sure this customer is happy with the purchase they made.

As a consultative sales rep, you've already developed a relationship with the customer. You've talked at length about their business and their needs. You've designed a process for them in your product. Now, take them over the finish line—help them implement the theories you've discussed into their everyday workflow.

Keep adapting your consultative sales process to your customers' needs

Here's the real deal: a consultative sales process should never be a step-by-step process you go through repetitively day after day.

The consultative selling steps are adaptive. It flows in a clear direction but is willing to make adjustments to fit each customer's needs or changes in the way customers want to buy.

When you keep upgrading and improving your process, that's when you'll be a truly successful consultative seller.

What other skills do you need to succeed at consultative selling? Jump to the next chapter to find out.

The consultative sales approach: 10 skills to get started

Here's the deal with a consultative sales approach: You can't fake it.

This sales methodology requires a certain personality and level of expertise that can't be learned by memorizing [sales pitch scripts](#) or imitating someone else's style.

There's a difference between selling a product and using a consultative selling approach. So, ask yourself: do your customers view you as just another sales rep, or as a trusted advisor who can help them solve their problems?

What are the consultative selling techniques that are key to winning with this model?

Let's discuss 10 consultative selling techniques and skills you need to succeed.

10 consultative sales approach techniques & skills to master

To be a consultative seller, you need to be an absolute master of all knowledge in these three areas:

- ✓ Your customers
- ✓ Your industry
- ✓ Your product

Let's talk about the specific skills you'll need to master these three areas of consultative selling.

1. Be an expert in your industry

Talking to customers about your industry should feel like playing on the home field.

Here's a real-world example: the sales team at Close can act as expert guides to our customers because **they're salespeople selling sales software to other salespeople**. They have intimate knowledge of the industry because it's part of what they do every day.

But even if you don't have this home-field advantage with your product, you can still build genuine expertise in your industry. Here are some ways to do so:

- ✓ As you talk to customers and prospects, be genuinely curious about what they do and how they do it
- ✓ Follow top industry voices on LinkedIn
- ✓ Subscribe to podcasts that discuss your industry
- ✓ Subscribe to newsletters that give you top articles and trends in that industry

(Psst... want the best roundup newsletter for sales? [Subscribe to the Sales Brief](#), our weekly newsletter that delivers the best advice and guidance to over 400k sales professionals every week)

When you stay up-to-date on the latest trends, current events, and research in your industry, you'll be able to provide valuable insights and guidance to your customers, not just 'sell them'.

2. Talk to your customers regularly

You've probably heard the phrase "know thy customer" before. So, what does it actually involve?

Start with your [ideal customer profile \(ICP\)](#). An ICP tells you more than simply who your current customers are—it singles out a list of clear characteristics that define the customers who are most successful with your product or service.

This also involves knowing the [key customer pain points](#) that move people to search for your product or service.

But here's the real key: you need to actually talk to your customers.

Team up with your Customer Success team to learn more about the customers that are highly effective with your product. See if you can jump on a call with them and get to know their business challenges and how your product or service is helping them succeed.

You can also [follow up with customers](#) that you've closed in the past and are still happy with your product. Learn about their achievements and the way they use your product on a day-to-day basis.

The more you know about your customers, the better you'll be able to relate to your prospects.

3. Be genuinely curious

This is truly one of the core consultative selling skills, and honestly a core skill for any type of salesperson.

Genuine curiosity does 3 things for you:

- ✓ Allows you to show real interest in your prospects
- ✓ Motivates you to keep learning about your industry
- ✓ Keeps you on your toes with new trends and skills

Of course, curiosity isn't a skill you can learn; it has to be part of your personality. But you can encourage your own natural curiosity by focusing on the people in your [pipeline](#) instead of the numbers.

James Urie, Sr. Account Executive here at Close, explains it this way:

“The best salesman in the world are people who are deeply empathetic. They can put themselves in someone else's perspective. They ask questions to really get a thorough understanding of the challenge that they're trying to solve. They give the prospect tangible solutions, where that person can actually visualize how it's going to be solved. And then you give them a path of execution.”

Watch the whole conversation here:

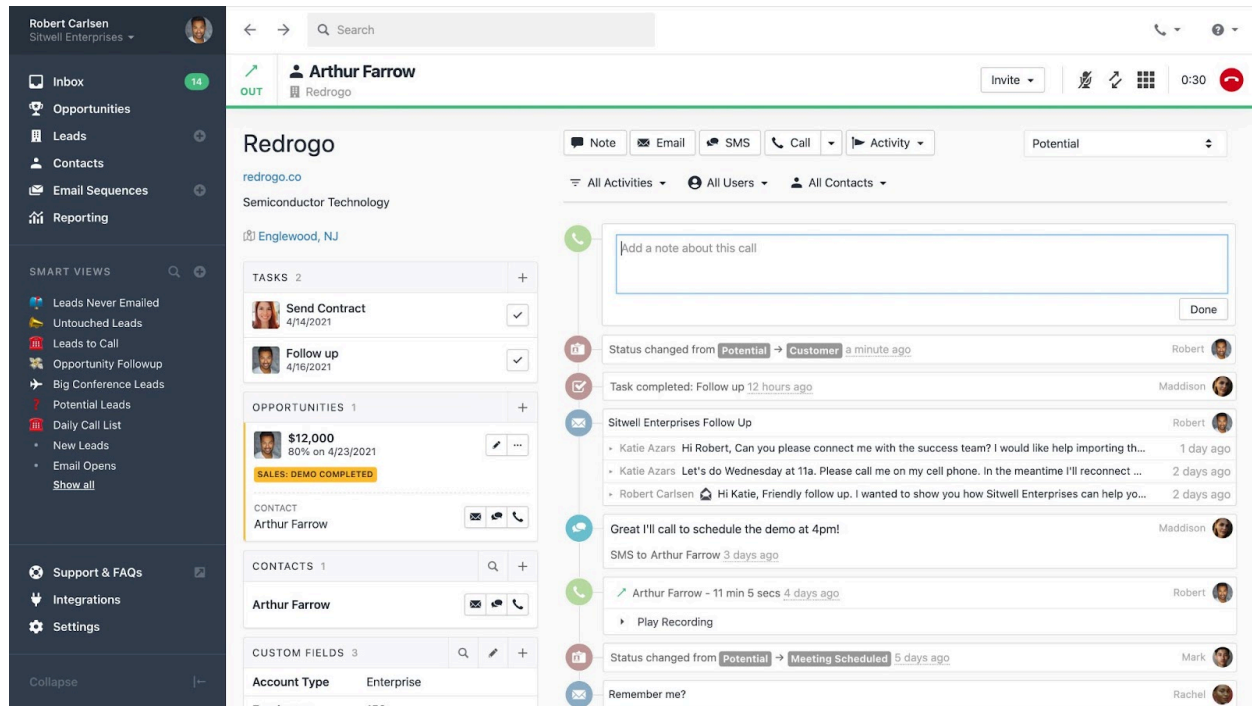


4. Master the use of your CRM

Of course, with all these conversations, it's important to store information so you can go back and get relevant context on every deal (and every individual).

That's why having a communication-focused CRM is so important for a consultative selling strategy. When your communication happens in the same place where information is stored, that accelerates your prep time and optimizes your workflow for the most efficient communication with your customers.

Here's how this works in Close: on the lead page, you can see a history of your previous conversations with a prospect, including emails, call notes, SMS, and Custom Activities. You can also make calls directly from this page, meaning all the right context is in front of you while you talk.



Pro tip: Talking to your customers via Zoom? Simply [connect your Zoom account to Close](#) and you can run meetings directly from the lead view. Get the right context, add notes during the call, and even access Zoom recordings from one centralized location.

5. Learn how to control the conversation

[Controlling sales calls](#) is a skill all sales reps must master. Otherwise, you'll allow the conversation to be constantly derailed by the prospect's whims.

Here are 3 quick tips to control sales conversations:

- ✓ Have a clear goal to accomplish with this call

- ✓ Set up a [structure for the call](#), like an outline to keep you on track
- ✓ Ask questions that lead you through that structure

Remember, your role as the consultative salesperson is to guide potential customers toward a solution that fits their needs.

As you ask questions, you're learning about their needs but also guiding them towards new ways of thinking or solutions they hadn't considered before. Open-ended questions that allow the customer to talk will give you insight into their situation, and you'll be better able to lead the conversation toward a solution.

Want to know more about the questions you should be asking? Jump to Chapter 3 of this guide.

6. Be authentic and honest

I've always been a big promoter of [authentic sales](#). Your prospects know how to spot inauthenticity—and once they sense it, they'll be turned off by you, your company, and your product (even if they would've been a great fit).

Authenticity means being yourself, but without being overbearing or pushy. Be flexible to different people and different personalities, but don't use psychological sales tactics to trick people into liking you.

Here are more of my thoughts on authenticity:



There are too many salespeople telling their customers what they think they want to hear just to make a sale. Don't be that person.

In some cases, a consultative sales approach includes telling a prospect they're not a good fit. While it may be hard, you'll both walk away from the conversation satisfied and with that trust intact. And who knows, this same person may remember your honest approach and might come back to you down the road. We've seen this many times at Close: prospects wanting to buy Close, even though we told them we're not a good fit. From the very beginning, we've always recommended other CRM systems when we believed they were a better fit for a customer. People were flabbergasted—but many of them later referred us to others, or became customers as their company evolved and Close became a better fit.

7. Practice active listening

When you ask questions, you need to listen. This may seem obvious, but it's scary how easy it is to get caught up in your own thoughts and what you're going to say next that you completely miss the answer to your question.

We've discussed listening as part of the consultative selling process in Chapter 1, but let's discuss some ways you can develop the [skill of actively listening](#).

First, **learn from the best listeners you know**. This doesn't have to be in a business setting—think about the best listener you know, and talk to them. Try to focus on what makes them a good listener. How do they respond when you talk? What's their body language?

Next, **mentally echo what you hear**. When your mind is repeating what your conversation partner is saying, you won't get distracted by what you're going to say next. Having a call structure as we mentioned before can also help since you'll be comfortable enough with your side of the conversation to focus fully on what you're hearing.

Finally, **practice listening and summarizing**. Again, you can practice this aspect of active listening in any part of your daily life. If you get into the habit of listening carefully and repeating a summary of what you understood, this will help you on sales calls to listen more closely and confirm that you got the point.

8. Build your personal brand

While this technique may not be for everyone, it is an excellent way to build trust and authority.

Remember, consultative selling has a lot to do with the customer's perception of you. If they don't see you as an expert that they can trust, this model won't work for you.

Building your personal brand is a great way to demonstrate your expertise and industry knowledge. This will help potential customers recognize you as an authority, and put more trust in the advice you give them.

Again, **this is something that can't be faked**. It all goes back to being a true industry expert that your customers can trust.

So, as you learn about your industry, form your own opinions. Talk to experts. And start sharing your insights and experience on LinkedIn, Medium, or other platforms.

9. Know your product inside out

You should be able to navigate your product as well as you can navigate from the bed to the bathroom in the dark.

That's the only way you can really show your prospects how to use your product to get the most benefit out of it.

According to the [LinkedIn State of Sales 2021 report](#), 44% of buyers called “Not understanding their own product or service” as the second-biggest deal-killer.



If you don't feel like you know your product well enough, it may be time to take a refresher course. Talk to your Product or Engineering teams to get a full walkthrough of new features. Take advantage of any content created around the use of your product. If possible, test things out for yourself.

The more you know your product, the better you'll be able to consult with customers on how to use it to its full potential.

10. Be confident enough to stand your ground

Some people say the customer is always right, but I don't agree.

Sometimes the customer is wrong. Sometimes they don't have a full understanding of the root causes of their business problems. Sometimes they're looking for a solution that won't really solve their issues. Sometimes the decision-maker is trying to force a solution that the end-users don't like or need.

As a consultative seller, you have the expertise and knowledge to guide customers. But when customers don't want to be guided, you need to have the gumption to push back and [communicate with confidence](#).

Here's how James Urie, Sr. Account Executive here at Close describes it: "You should be very confident in what you are an expert in and how you can solve problems. That confidence relates to trust. If you are extremely confident on how you'll help someone solve a problem, it builds trust helps you ultimately close the deal, but also really help someone."

Know when to challenge a customer's way of thinking. This will prove your value as a trusted advisor, and show them what they actually need to succeed. Care about their success, and they'll appreciate it in the end.

Put these consultative selling techniques into practice

The consultative selling approach is built on the basis of genuine interest in your prospects and expertise with your industry and product. Use the above techniques to build your own skills and improve your methods with consultative selling.

Of course, a major piece of the consultative selling strategy involves asking the right questions. Jump to Chapter 3 to learn exactly which questions to ask, and how to make the most of the answers you get.

The consultative sales approach: 10 skills to get started

Consultative sellers are like good doctors: they ask questions to get to the root of the problem and solve it.

When was the last time you went to the doctor and they simply prescribed a generic solution without really listening to you?

If it's happened to you, you understand how frustrating it can be.

To be a consultant for your customers and prospects, you need to ask questions and listen to what they have to say.

That's why consultative selling questions are such an important part of this methodology.

Let's find out:

- ✓ How to ask consultative sales questions
- ✓ 27 consultative selling questions to ask in your sales calls

How to ask consultative sales questions

Remember that you're not just reading through a list of questions and checking off the boxes.

Consultative selling is about showing genuine interest in your prospect and conversing with them.

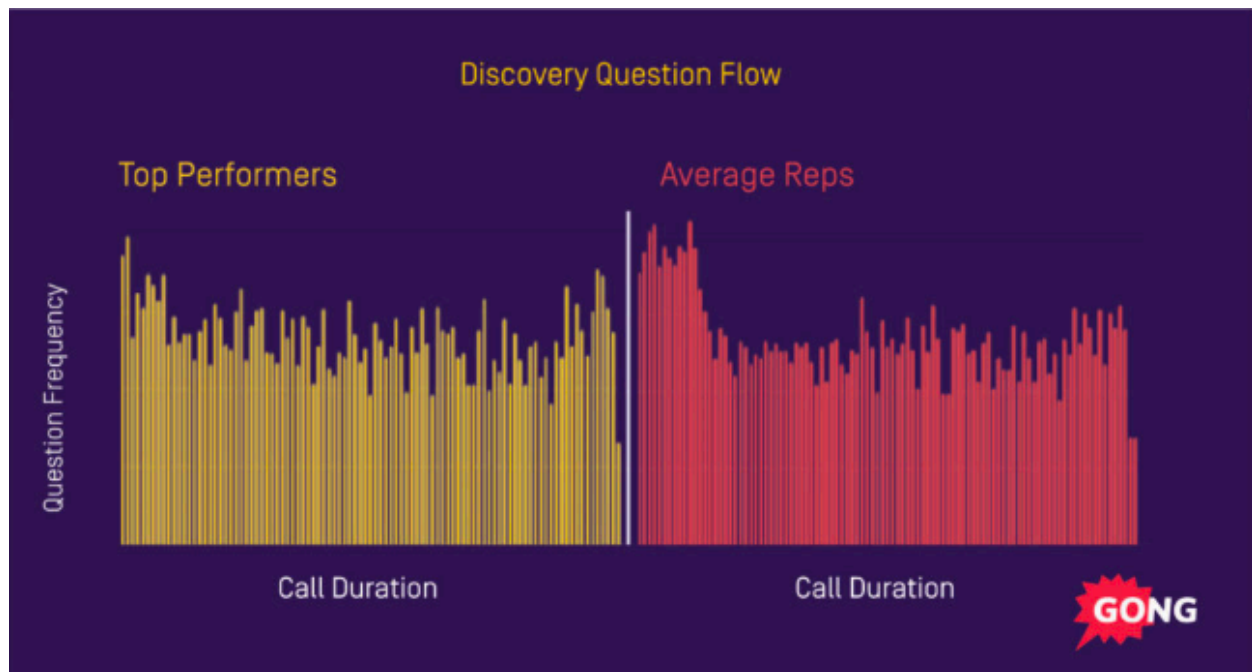
If your questions sound more like an interrogation than a conversation, you need to rethink [how you're asking questions](#).



The key to this is something we've mentioned before in this guide (and doggonit, I'm going to say it again): you have to actually care about the people you're talking to.

Real, genuine curiosity will stop you from asking a list of random questions and motivate you to really converse with a prospect.

[Ask follow-up questions](#) when they answer. Dig into what's really going on beneath the surface. Weave your questions throughout the conversation (this was actually proven to work by our friends at Gong):



This is how consultative sellers ask questions.

So, what questions should you be asking?

27 consultative selling questions to ask in your sales calls

This list is by no means comprehensive, and shouldn't be taken as a consultative selling script to follow exactly.

That said, these consultative sales questions can help guide you towards the right kind of questions in conversations with prospects.

1. What prompted you to look for a solution now?

This is an excellent question to ask your new inbound leads. Looking for the catalyst event that made them reach out now can tell you how urgently they need a solution, as well as the major pain point they're looking to solve.

2. What motivated you to take this call with me?

For outbound, this is the alternative to the above question. When you book that meeting after sending a [cold email](#) or making [cold calls](#), it's great to know why they accepted your call. This can tell you both about current issues they want to solve, as well as the piece of your [sales pitch](#) that truly resonated with them.

3. How is [problem] causing issues for your team/your business?

There are four main areas where your customers could be experiencing pain:

- ✓ Financial pain
- ✓ Productivity pain
- ✓ Process pain
- ✓ Support pain

It's important for consultative sellers to determine which of these four main [customer pain points](#) their prospect is experiencing. This will help them find the solution that best solves their pain.

Example: "You mentioned you're having trouble smoothing out your hiring process. How is this causing issues for your business? What kind of issues does this cause for you personally?"

4. What's your biggest obstacle to reaching your goals for this quarter?

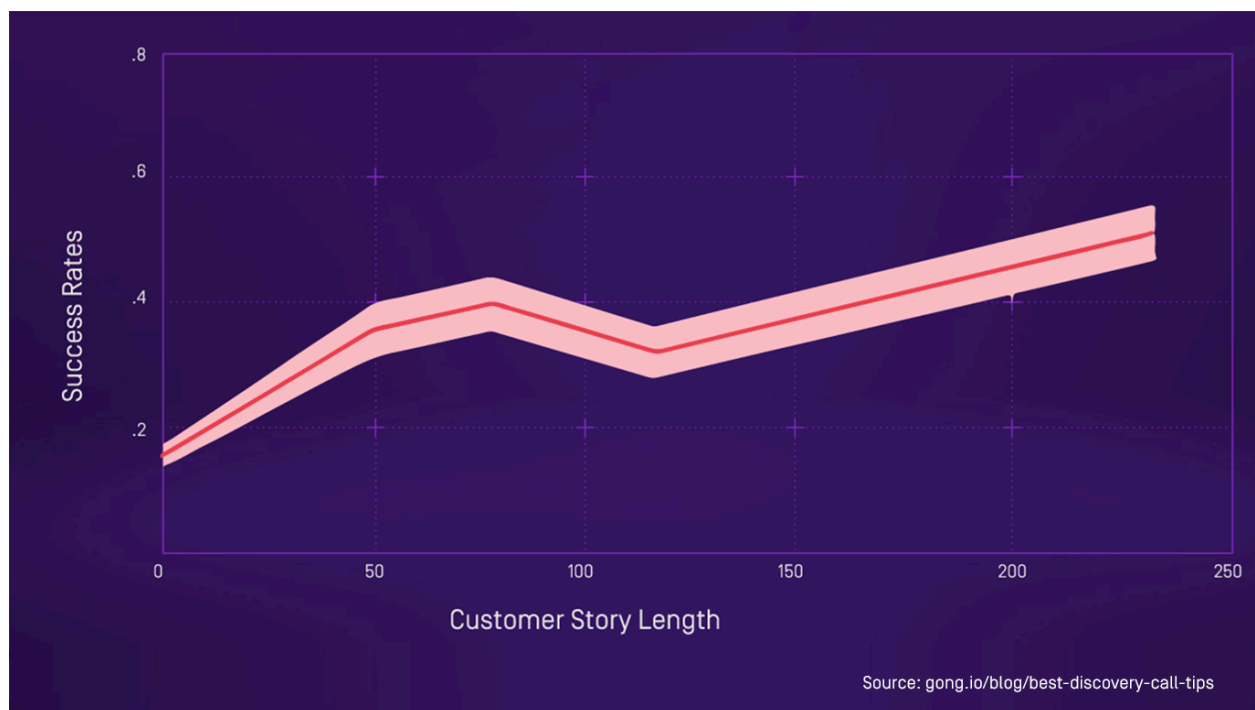
While pain is one motivator for purchase, another key motivator is reaching important goals.

Rather than ask generic questions about what's going on in the team and what they're doing over the next quarter, dig deeper into what's stopping them right now.

This question can help you determine a solution that will get them one step closer to reaching their goals.

5. Walk me through how you currently handle [problem].

Consultative selling questions normally avoid yes or no answers and are meant to draw the prospect out and get them talking. In fact, it's been found that there's a direct link between the length of time a customer talks during the conversation and the success rate:



This question serves as a signal to your prospects that you're looking for a long explanation.

Understanding how the prospect currently handles the issues or pain points they're facing can help you get a better picture of their situation, and possibly help them find a solution they hadn't thought of before.

6. What's working with your current solution/process? What's not working?

Just because your prospect is interested in a new solution, doesn't mean they're ready to throw everything they have out the window.

This consultative sales question helps you understand the pieces of their process, workflow, or tool stack that they're seeing success with. Then, you'll have a better understanding of where they need help and how your solution will fit with what's currently working for them.

7. How did you end up with your current solution? What were the deciding factors? Who made that decision?

Knowing the decision-making process of your prospect's company is important for consultative sellers since you'll need to include the right people at the right time to [close the sale](#).

8. In an ideal world, what should this process look like? What would you need to accomplish that?

Give your prospect the liberty to use their imagination and build the scenario of their dreams. When you allow them to express their real wants and needs, you can help guide them toward the solution that fits what they actually want, not simply what fits into the constraints of what they (or their managers) think is possible.

9. What's something you would never want to see changed?

Good consultative sales questions will tell you which hill your deal will die on. What will this prospect fight to keep? Is this something that's congruent with the solution you're offering?

10. What concerns do you have about making a change?

Preempt objections with this question. You don't have to wait for your prospects to voice their concerns when you thought the deal was as good as done. [Manage objections](#) early to smooth out the sales process later on.

11. On your list of priorities for this year/quarter, how does solving this problem rank?

Urgency is key to buying, and a consultative seller should know how urgently their prospect needs a solution.

Honesty is key here. If you see that the prospect doesn't view the purchase as a priority, you can either help them see why it should be by directing their attention to the value, or you can end the process here and agree to follow up down the road when this is a priority.

12. How much of a priority is this to your manager/CEO?

While your main POC might see this as a big priority, you should know early on if there are other people with buying power that still need to be convinced. Then, you can work alongside your prospect to develop a solid business case for the purchase, or help them pull the right data to show why this should matter to the company as a whole. You want to equip your internal champion not just with what they need, but also [recruit more internal champions](#), especially if a large deal is at stake.

13. Where do you see yourself in 6 months if this issue isn't solved now?

Again, imagination is important. Questions like this can help [create urgency](#) in a prospect who doesn't see the long-term effects of putting off this solution.

14. How do you see your business growing over the next 1 or 2 years? How would that change your needs in this area?

Consultative sellers are focused on the future of their customers, not just closing the sale today.

That's why it's important to ask consultative selling questions about the future of the business and its growth.

For example, let's say you sell a product that's best for SMBs and small teams. You're talking with a new startup business that's a perfect fit for your [ideal customer profile](#). But then, asking these questions, you realize they've just landed a round of funding and are planning on hiring aggressively over the next few months.

Sure, they're a good fit now—but they won't be tomorrow.

Consultative selling is about asking the right questions and then being open and honest when you see something that might be an issue.

15. What do you find most interesting about our solution?

What's attracted this prospect to your solution? Which pieces of your product do they really understand, and have they gotten a clear understanding of the key functions of your product?

16. When you're evaluating a new solution, what are the top 3 things you look for?

This is another great [discovery question](#) to help you understand the buying process of the company. Ask follow-up questions to see if this is criteria for the whole team, and who set these criteria.

17. Which other tools are part of your stack? What kind of integrations would you need?

A consultative sales script should include questions about the rest of the tool stack and how it's currently being used. After all, you can't effectively advise your prospect on the best way to move forward without knowing the full story of their current tools and how they're being used.

18. Are you considering other solutions? Why those?

This is not the time to go on the defensive. Listen carefully to truly understand what makes these strong contenders for this prospect's attention.

19. Tell me something that really stood out to you with [competitor].

Understanding what attracts your prospect to a competing product or service can give you necessary insights into their needs and wants.

Is there a feature that your competitor offers that you don't? Is their platform a better fit for this customer? Don't be afraid to lose bad-fit customers to your competitors. It'll work out best for both parties.

20. What's your plan B to solve this problem?

There may be a silent plan B in the wings, just waiting to crush your deal at the last minute. Are they thinking of building their own solution in-house? Are they going to mickey-mouse a solution out of Excel and duct tape if they don't get budget approval from higher-ups?

Knowing the plan B can help a consultative seller to show prospects which is the better solution, and the possible side effects of throwing together a last-minute solution that doesn't fit their needs.

21. What's the main metric your team uses to track success? If you found the right solution, what would be the effect on that metric?

Point to real value and actual numbers, and your prospects will have a clearer picture of the results they expect from purchasing your solution.

22. When is your boss/CEO expecting to see improvement in this area?

Knowing what management expects can help you set priorities and schedule your sales cycle correctly.

23. When do you realistically see yourself achieving these goals?

Of course, sometimes management doesn't really get the timeframe of the end users. That's why it's important to compare these two timelines and help bring them into alignment if possible.

24. How would solving this problem affect you/your team?

This question is actually not meant to think about metrics and KPIs, and instead focus on the people. How would the quality of the work improve? What about productivity, job satisfaction, or retention?

25. What obstacles could stop this deal from happening?

What's standing in the way of you and a closed deal? Learn more about what might put this deal in danger, and how you can work preemptively to solve those issues before they come up.

26. What kind of support/service/help do you need to become insanely successful?

Support is a major customer pain point, and making sure your prospects will have the support they need throughout the buying process and into their lives as customers is essential. Make sure you know what they need and that your solution can provide it.

27. What will it take for you to become a customer?

This is [my go-to question to close the deal](#). I call it going through the virtual close, talking through each step of the process until we arrive at the moment of closing the deal. This helps consultative sellers understand the buying process of their prospects, and work in tandem to complete necessary tasks (such as legal or technical items) to get the deal closed faster.

For consultative selling to work, never stop asking questions

This list is just the start. Remember, you're having a conversation with your prospects. So, don't just ask one question and move on to the next: really try to understand what they're telling you.

One way to do this is to keep asking follow-up questions:

- ✓ How does that work? Help me understand this a little better.
- ✓ That's interesting. Can you tell me exactly what you mean by...?
- ✓ Do you have an example of that for me?

This shows prospects you really care about getting them the solution they need, not just closing another deal.

So, what does the consultative sales process look like in the real world? Head to Chapter 4 to see real examples of consultative selling.

Consultative selling in the real world: 8 examples to learn from

The best way to learn a selling process is to check real-world examples.

We've curated some of the best consultative selling examples that can help you learn what it really means (and some of them may be in areas of life you weren't expecting).

Check out these 8 examples of consultative selling in the real world:

Top 8 consultative selling examples to learn from

There are plenty of places to find good examples of consultative selling: all we have to do is look.

1. How we made \$5M+ solving problems

Resource type: Video

Key takeaway: Consultative sellers will actively turn down business that's not a good fit



Ravi explains that saying "No" to 68% of the people who applied to speak with his agency and turning down prospects that weren't a good fit has actually helped his business grow to earn over \$5M in 2 years.

2. The consultative seller that educates his prospects

Resource type: Video

Key takeaway: When you focus on the best interest of your potential customers, you'll naturally start selling in a consultative way



James Urie, Sr. Account Executive at Close, talks about a typical demo process at Close. He explains what it's like when he gets on a call with a new prospect, some of the questions he'll typically ask, and how he takes the time to understand and educate his prospects.

Watch the whole conversation to learn more about the consultative selling method, as well as 2 more real-world examples of this approach.

3. Consultative Selling in Action

Resource type: Article

Key takeaway: It takes consistent effort over a period of time to have results

Jamie Irvine felt like he wasn't getting results, even though he was doing all the right things as a consultative sales rep. But he found that patience and constantly putting himself in front of his customers provided him better opportunities to be a consultative salesperson.

4. Consultative Selling—we see great examples everywhere

Resource type: Article

Key takeaway: Consultative selling means asking the right questions to find the right solutions

David Brock's article goes through 3 examples of consultative sales that he experiences in a day of shopping with his wife. Each of these demonstrates the power of questions, as well as how in-depth knowledge of what you're selling gives buyers the confidence to trust your judgment.

5. Caliper Competency Library, Consultative Selling

Resource type: PDF

Key takeaway: Active communication, interpersonal skills, and self-management are key skills of consultative sellers

This quick worksheet goes through the main competencies of a consultative salesperson, and gives specific examples of how a salesperson using this model will act, react, and relate to customers.

6. Lowering resistance by seeing if they have a problem

Resource type: Video

Key takeaway: Before you start selling a solution, see if your prospect has a problem

Sales expert, Josh Braun, gives some excellent tips for consultative selling, along with a real-world example that shows exactly what this looks like in practice.

7. This is What Consultative Selling Looks Like

Resource type: Video

Key takeaway: Consultative selling works even if your product isn't very technical



Michael Harper talks us through an everyday example of consultative selling. His main point: focus on improvements, not 'features'.

Pro tip: Learn more about Sales Scripter and the work they do in our [Sales Consultants Directory](#).

8. Consultative Sales Process Overview & Graphic

Resource type: PDF

Key takeaway: Consultative selling follows a process that's simple to repeat, but takes practice to execute correctly

Quick and simple, this graphic shows exactly what's involved in the consultative sales process and gives pointers on building your skills within these stages.

Get the right help to up your consultative selling skills

Learning about this methodology will help you know more about it; getting trained will teach you how to use it in your everyday sales process.

Want to lock in these consultative selling skills? Check out the next chapter for training options that fit your needs.

21 consultative sales coaching and training resources to up your game

Are you sold on consultative selling? Then it's time to get the right training for yourself and your team and really put this sales model to work.

We've compiled the ultimate list of places to look for consultative sales training and coaching, as well as some tips to help you decide which one is best for your team. Let's discuss:

- ✓ What to look for in consultative selling coaching and training resources
- ✓ Top 21 consultative selling courses & training resources

What to look for in consultative selling coaching and training resources

If you've ever done any type of [sales training](#), you know: not all resources are created equal. The same goes for consultative sales training.

If you're trying to decide between multiple resources, here are some key things you should look for:

- ✓ **The right learning format for your needs:** Looking for an in-house training workshop for your whole sales org? Or are you an individual rep looking for on-demand training to boost your skills? Decide which learning format is right for you, then choose a program that fits those needs.

- ✓ **A clear outcome:** Whether it's a consultative sales certification, specific strategies, templates, scripts, or something else, you should walk away from training with something tangible that you can use further down the road.
- ✓ **Bias toward your industry:** We all know that different sales strategies work very differently in different industries or types of sales. For example, if you're an inside SaaS sales rep, you should look for consultative selling training that keys into that style of sales.
- ✓ **Proven experience teaching with good results:** Especially when you're about to spend money on your own training or that of your team, you want to make sure you're going to get a solid return. Check the reputation of the company that's offering and reviews of previous clients.

Ready to check out the top training courses?

Top 21 consultative selling courses & training resources

Dive into this list to find consultative sales training programs that will boost your skills and help you relate better to your customers.

1. Consultative Selling Training

Provider: [Richardson](#)

Learning format: Online or in-person workshop

Course length: 2-day workshop + pre and post-digital learning

Best feature: Various formats to fit your team best

Richardson is known as a top-dog of sales training, having trained over 3.5M individuals in over 900 organizations. This course digs into the practical steps reps must take to be consultative sellers, from the planning and prospecting stages all the way to the close.

2. Sales Skills Training: Consultative Selling Master Class

Provider: Lawrence M. Miller, Institute for Leadership Excellence / [Udemy](#)

Learning format: On-demand video + downloadable resources

Course length: 6 hours of on-demand video

Best feature: Includes real field research conducted on the behavior of top-performing sales reps

This highly-rated course is led by the veteran CEO of a consulting firm and has been used by top companies to train their sales team on the consultative selling process.

3. Consultative Sales Skills Training Course

Provider: Baker Communications

Learning format: On-site training workshop

Course length: 1 or 2-day workshop

Best feature: Learn to sell long-term relationships rather than transactions

This in-person training is built for large sales orgs that want to give their whole team an interactive introduction to consultative (or relationship) selling.

4. Consultative Sales Training: The Best Consultative Selling Strategies

Provider: [ASLAN](#)

Learning format: Online or in-person workshop

Course length: 4 half-day virtual sessions, or 2-day on-site workshop

Best feature: Strategies and training based on 25 years of research and field testing with over 50k sales professionals worldwide

If you're looking for a training program that gives your reps not only instruction, but the practical support they need to implement what they've learned, this may be the one. ASLAN offers a custom training program for sales orgs of all sizes, built to change the mindset of your team and give them a strategic approach to succeed.

5. Consultative Sales Training to Win More Business

Provider: [Funnel Clarity](#)

Learning format: On-demand online course

Course length: 16+ hours of mixed media content, plus 1 hour per week of reinforcement content

Best feature: Includes certificate of completion and online reinforcement after finishing the course

This self-paced online course is more than just videos: it's a mix of media and practice opportunities to bring concepts into the real world.

6. Consultative Selling Skills

Provider: [Ariel](#)

Learning format: Online or in-person workshop

Course length: Customized based on your needs

Best feature: Participants learn how to position themselves as a strategic partner and shorten sales cycles

This flexible training from Ariel is a mix of instruction, discussion, and role-playing exercises to help your sales team build deeper relationships with customers and deliver better solutions.

7. Consultative Selling Reinvented

Provider: [Base Over Apex](#)

Learning format: In-person workshop

Course length: 1-day program

Best feature: Instructor-led learning from professionals with over 15 years of sales experience

For companies based in the Calgary area, this in-person sales training is a great option to help your team build the right personality traits for consultative sales success.

8. Consultative Selling Skills

Provider: [Boulden](#)

Learning format: Online or in-person workshop

Course length: 2-day workshop

Best feature: Applies Neuro-Linguistic Programming (NLP) techniques to the Consultative Sales process

Designed to take early sellers to an advanced level of consultative selling, this course includes a mix of sales tactics and psychology to help you build genuine rapport and trust in the sales process.

9. Consultative Sales Skills Training Course

Provider: [Zentano](#)

Learning format: Online or in-person workshop

Course length: 1 workshop delivered per month over 12 months

Best feature: Built to help your team develop a following of loyal and engaged customers

Zentano has developed their own 5-stage approach to consultative selling, what they call "Consult with D.A.V.I.D." In this training program, your team will learn what this means, and how to execute it in practice.

10. Consultative Selling

Provider: [The In-House Training Company](#)

Learning format: In-person workshop

Course length: 2-day workshop, or bespoke option available

Best feature: Sales reps learn to structure their calls, ask the right questions, and establish credibility

This growing UK-based training company offers on-site training across the country and internationally for sales teams that want to improve their rapport and relationships with customers.

11. Consultative Selling Skills Training Course

Provider: [ZOE Talent Solutions](#)

Learning format: Online or in-person workshop

Course length: 3 days live online, or various schedule options for classroom learning

Best feature: Stop pushing and start pulling—build credibility with customers

ZOE Talent Solution follows the training methodology 'Do-review-learn-apply'. Their training programs are delivered live online, or via classrooms spread across the world. Check their website for upcoming courses.

12. Consultative Selling – Business Development for Tomorrow's World

Provider: [Dale Carnegie](#)

Learning format: In-person training

Course length: Contact for details

Best feature: Built on timeless human relations principles, and the attitudes and mindset of successful consultative sellers

This in-person training from worldwide training company Dale Carnegie is built to help sales teams ask better questions, and develop more repeat business with customers.

13. Insight Selling: Advanced Consultative Selling

Provider: [RAIN Group](#)

Learning format: Online or in-person workshop

Course length: Contact for details

Best feature: Teaches an advanced consultative selling technique known as insight selling

RAIN Group is a well-known training and research company devoted to advanced sales tactics and improved results for their clients. Their proprietary sales methodology, Insight

Selling, is based on studies of B2B purchases and sellers to see what works and what doesn't. The training is built to take you through specific skills and strategies, such as: making an ROI case, mini-stories that sell, influence and persuasion, and mastering sales collaboration.

14. Insight Selling Virtual Learning Course

Provider: [RAIN Group](#)

Learning format: On-demand video lessons

Course length: 15 lessons of 20 minutes each

Best feature: Self-paced course to learn advanced consultative selling method—insight selling

This virtual learning program from RAIN Group is great for individual sales reps who want to learn Insight Selling at their own pace.

15. Advanced B2B Consultative Selling Certification Course

Provider: [WorldLeaders](#)

Learning format: Live online class

Course length: 2 half-day sessions

Best feature: Built to help B2B sales reps navigate complex deal structures and build skills in Intellectual Encouragement

This online class includes group discussions, practice with roleplay, and specific training for all client-facing roles. Attendees will also get templates, scripts, and tools to implement what they've learned in the real world.

16. Consultative Selling

Provider: [Speak First](#)

Learning format: Online or in-person workshop

Course length: Contact for details

Best feature: Training courses built on 30 years of experience and tailored to your company's needs

Speak First is great about tailoring their offerings, meaning you can choose either blended learning, in-person training, or virtual training for your sales team. The modules of the course can also be adapted to best fit your team—the outcome is sales reps that are able to use the consultative selling approach effectively with a clear structure that keeps them on track.

17. Consultative Sales Coaching & Training

Provider: [Sharon Landis Consulting](#)

Learning format: Virtual one-on-one coaching

Course length: Contact for details

Best feature: Specially adapted for software founders and sales teams

Coming from over 15 years of experience in startup sales, Sharon Landis has enough tech experience to run circles around some of today's top tech CEOs. She offers one-on-one training for sales professionals in the SaaS and startup world who want to build their consultative selling skills.

18. Consultative Sales Growth Coaching Program

Provider: [Anthony Cole Training Group](#)

Learning format: Virtual coaching + online library

Course length: 6-month program

Best feature: Individual training and coaching with supporting on-demand content

This intensive training gives your sales reps access to a personal sales growth coach. Over the course of 6 months, this coach gives them individualized training sessions, an in-depth evaluation of their progress, a library of supporting resources, as well as calls with the sales manager to update them on their team's progress.

19. Consultative Sales

Provider: [Canadian Professional Sales Association](#)

Learning format: Self-guided multimedia course

Course length: 6 hours of online content

Best feature: Specific training to help you strengthen client relationships

This 6-hour course is a mixture of videos, reading, and activities for sales reps. The point: learn how to use consultative selling techniques from the first call to negotiation and follow-up.

20. Consultative Sales Training Course

Provider: [Professional Development Training](#)

Learning format: Online or in-person workshop

Course length: 1 day

Best feature: A mix of consultative selling and psychological strategies, like cognitive reframing and persuasion techniques

Dig deep into the mind of your customers with this course, designed to help you engage better and build rapport with clients.

21. Consultative selling for technology professionals training

Provider: [High Tech Institute](#)

Learning format: Online or in-person workshop

Course length: 2-day workshop

Best feature: Created especially for tech pros and *non*-sales roles in tech companies

Working in a high-tech environment, it can be hard to explain the value of your solution when the client doesn't understand the problem they're facing. This course is specifically designed to help those tech professionals to boost their consultative selling skills and be able to turn resistance into a purchase.

The best training: go practice!

There is nothing better than the real-world training you'll receive by practicing the techniques and strategies you've learned.

In this guide, we've talked about what a consultative sales strategy looks like, how to develop the right skills for the job, what questions to ask, and more.

Now, it's up to you.

Take what you've learned in this guide and put it into practice. Start using the consultative sales strategy today, and you'll be a better salesperson tomorrow.

Want to use the CRM that optimizes your process for better customer relationships? Your free trial of Close is waiting.

Close is loved by inside sales teams.

Sell everything from SaaS products to real estate, insurance to EdTech.

Start your 14-day free trial