Consultative Questions: Qualifying The Client And The Project

OVERVIEW

Questions are a powerful tool that allows you to gain insight to the client's situation, problem and potential cures. In order to sell strategically and consultatively, you must become accustomed to asking well phrased, thought penetrating questions. More importantly, you must prepare questions in advance of the meeting.

Studies have shown that a well-phrased question will get the client to think about what you are saying and their situation better than your making a statement. The question forces the client to think and gains their attention. The well-phrased question cuts through all the clutter that is swirling around in their head. Questions also get the client to tell you their biases, preferences and even things they may not be consciously aware of. The question is part of an overall strategy that helps you change the game without the competition even being aware that the game changed. In addition, by asking great questions, the client cannot help but think of you differently, someone who is more consultative, and more experienced.

Every sales person, consultant, advisor, sales support person and executive should have a set of questions that are to be asked in various client situations. No one question or set of questions fits all situations. The questions that follow will stimulate your thinking and help you design your own questions for the client and specific the sales situation.

QUESTION TYPE: QUALIFYING QUESTIONS

Qualifying questions should be asked in the beginning phases of the sales cycle. Qualifying questions allow you to find out whether the client is serious about committing the funding and the resources to the project. Most consultants and sales professionals get so caught up in the prospective client's attention and willingness to meet with them, that they forget that their time and expenses are investments. And that if they meet with this client, they cannot meet with another client or do something else that might me revenue generating.

There are times when the client is researching a specific product, service or solution. And how they do this is that they bring in multiple providers of the service to gather their opinions, ideas and analysis in order to get educated on the issues and potential solutions. There are other times when the client has a vendor already in mind and they are shopping for the best price and they are using your proposal as a negotiating tool.

While these instances do not occur a lot, you need to be aware that the possibility is there. There are schools of thought in the procurement circles that this is a legitimate method to getting the best possible solution for the company at the best possible price.

These qualifying questions allow you to determine how serious the client is about moving forward and how you should prioritize you resources (time, energy, people, travel, money, etc.).

These questions can be used by external and internal account managers, consultants or other professionals on the organization as a whole or within subdivisions and business units.

1. You have a current provider, why are you considering not using them for this?
2. What is it specifically that your current provider is not doing well that has you considering another provider and solution?
3. How much funding is available for this project?
4. How will this project be funded?
5. Who are the people involved in making this decision? And when will our team be able to meet with them? (If you cannot meet with them, this tells you something.)
6. What are the decision criteria for selecting a provider?
7. When does this project need to be started (or completed)?
8. If we meet the needs that you outline, are there any reasons why you would not go with us?
9. You obviously know about our company, are their any things that you may have heard about us that I need to address?
10. Who is the final decision maker for this project?
11. Is the final decision maker the person who has the budget for this project?
12. How many other providers are you looking at or considering for a proposal?
13. Are you looking for a proposal or a cost estimate for right now?
14. Are you looking just for a price quote to see if there are alternatives to your current provider of services or is there something else?

15. How important is this project to the organization? What happens if this project is not competed? What are the ramifications to the organization?
16. I am confident we can deliver and meet the needs you have outlined. Are there specific areas that we have not addressed?
17. On a scale from one to ten, where ten is the ultimate solution, where do we stack up?
18. Do you believe we are a good match for this project?

By asking these questions, you are getting the right and necessary information from the prospective client that will allow you to determine if this prospective client is serious about moving forward. Several of these questions will allow you to determine if the client has a preconceived notion of you and your firm.

Remember, your time is valuable. The resources you have – especially your staff's time and energy – can be spent on something that is more important if the client is using you as a sounding board or an education vehicle. Finding this out early will allow you to make choices about how you can help the client or move on to better qualified opportunities.