



1. MAKE YOUR OWN CHILI

The consultative process is a method, and it contains the ingredients you need to succeed. But it's not the recipe – your job is to combine these ingredients into a sales “chili” that works for you. **Don't copy someone else's words!**

2. PLAN FOR THE OUTCOMES YOU WANT

When you begin with the end in mind, more of your mental energy is focused on the goal. Write down what you want Clients to **KNOW, FEEL, and DO** because of your interaction.

3. START WITH THE CLIENT'S AGENDA

Clients brace themselves for typical, product-pushing selling. Disarm them and differentiate yourself by starting with what's important to them and **what's on their mind**.

4. ENGAGE BEFORE YOU DELIVER OR DEMONSTRATE

Use the consultative sequence to make your conversations more Client-centered. Make sure you have values, priorities and needs on the table first. **Diagnose before you prescribe** – anything else is malpractice.

5. PLAN AND ASK LEVEL 2 QUESTIONS

Don't tell yourself a story or assume what clients need – ask them directly with Level 2 questions that uncover the desire to change. Level 2 questions are **the most underrated questions** in advising!

6. LEAD WITH THE NEED

Avoid the trap of Premature Demonstration by using the Client's need as the basis for your demonstration. Show them something because they need it – now you're talking about **Client value** and not just products or features.

7. LEVERAGE THE LADDER OF TRUST

When it comes to opinions about what's best for your Client, you're at the bottom of the Ladder. Can you get them to hear it from **sources they trust more**, like peers, colleagues, students, data...or themselves?

8. ASK FOR RECIPROCAL COMMITMENT

Don't play fetch – ask Clients to help you help them by proposing **SMART next steps** that help them meet their needs.

9. PRACTICE WITH FEEDBACK

Professionals in all complex disciplines better themselves in practice, not in performance. If you want to really hone your EDGE, **role play or record yourself** in dress rehearsal for the meeting.

10. USE THE TOOLS

Keep coming back to the AdvisoryEDGE™ Forum for new tools, resources, and ideas that help you master the most important part of advising – **human factors**.