



Consultative Telephone Sales and Customer Engagement Training Course

18 – 22 April 2027
Chicago





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Overview

Consultative Telephone Sales and Customer Engagement Training Course is a five-day professional course for inside sales representatives, account coordinators, business development staff, customer advisers, and telephone-based sellers who leave with a Consultative Sales Call Playbook. Participants prepare calls, open with purpose, build voice-based rapport, discover needs, connect value, diagnose objections, recognize engagement signals, secure next steps, and review follow-up. The course uses business services, technology, healthcare, and property scenarios. Agile Leaders Training Center develops consultative telephone sales and customer engagement.

Who Should Attend

- Staff responsible for outbound prospect and customer calls
- Teams responsible for inbound sales conversations and qualification
- Professionals responsible for discovery, value explanation, and objections
- Account support staff responsible for next steps and follow-up
- Supervisors responsible for reviewing telephone sales conversations

The course assumes participants conduct or support telephone sales conversations and leaves out general customer service, telephone etiquette, contact-center management, field sales, cold-email outreach, and broad negotiation training.

Departments and Industries

The course supports departments and industries where voice conversations develop sales opportunities and customer commitment.

- Inside sales and business development teams
- Technology and professional-service providers
- Healthcare services and appointment-based businesses
- Property and facilities service companies
- Education and training providers

Learning Objectives

By the end of this course, participants will be able to:



- Apply a preparation and purposeful-opening routine
- Use voice-based rapport and active listening
- Analyze needs through sequenced discovery questions
- Build value statements from customer priorities
- Diagnose objections and sustain engagement
- Evaluate commitments, follow-up, and call quality

Course Agenda

Day 1: Call Preparation and Opening

- Sales Call Objective and Customer Context Sheet
- Purposeful Opening Statement Builder
- Voice Tone, Pace, and Rapport Guide
- Consent and Relevance Opening Check
- Call Agenda and Transition Map

Day 2: Discovery and Engagement

- Customer Need Discovery Question Funnel
- Active Listening and Signal Capture Grid
- Problem, Impact, and Priority Note Frame
- Engagement Signal Recognition Checklist
- Discovery Summary Confirmation Loop

Day 3: Value and Objections

- Need-to-Value Connection Canvas
- Benefit and Evidence Statement Pattern
- Objection Diagnosis Question Tree
- Concern Acknowledgement and Response Frame
- Value Conversation Re-Engagement Route

Day 4: Commitment and Follow-Up

- Customer Commitment Readiness Check
- Next-Step Ask and Choice Structure
- Action Owner and Timing Confirmation Record
- Telephone Sales Follow-Up Plan
- Sales Call Review Scorecard



Day 5: Telephone Sales Practice

- Exercise: Prepare and Open a Relevant Sales Call
- Exercise: Discover Needs and Confirm Priorities
- Exercise: Connect Value and Diagnose an Objection
- Exercise: Secure a Next Step and Plan Follow-Up
- Capstone: Consultative Sales Call Playbook

Practical Exercises

The course uses suggested activities based on telephone sales in business services, technology, healthcare, and property.

- Suggested activity: prepare a customer context sheet and deliver a purposeful opening with a relevance check.
- Suggested activity: use a question funnel, capture engagement signals, and confirm the customer's priorities.
- Suggested activity: connect an identified need to value and diagnose the concern behind an objection.
- Suggested activity: secure a specific next step, document ownership, and review the call with a scorecard.

FAQs

Who suits consultative telephone sales and customer engagement training, and what does it assume?

Inside-sales staff, business-development teams, account coordinators, customer advisers, and telephone-based sellers suit the training; it assumes responsibility for sales conversations or their follow-up.

How does consultative telephone sales differ from general telephone etiquette training?

Consultative telephone sales focuses on customer context, discovery, value, objections, engagement, commitments, and follow-up rather than courtesy, call routing, holds, transfers, or message taking.

What discovery questions improve customer engagement in telephone sales?

Effective discovery questions explore the current situation, desired result, problem, impact, priority, decision criteria, constraints, and willingness to take a next step.

How should telephone sellers respond to customer objections?

Telephone sellers should acknowledge the concern, ask diagnostic questions, verify its cause, connect the response to the customer's priorities, check whether the concern is resolved, and avoid arguing.



How should a consultative telephone sales call end?

A consultative sales call should end with a summarized need, agreed value, explicit next step, named action owner, timing, follow-up channel, and confirmation from the customer.

Conclusion

Participants take back a Consultative Sales Call Playbook containing preparation sheets, opening builders, discovery funnels, signal grids, value canvases, objection trees, commitment checks, follow-up plans, and review scorecards. It changes product-led calls into customer-centered conversations with verified needs and explicit next steps. The playbook supports consistent engagement, accountable follow-up, and evidence-based call improvement.