

Case Study

Consultative Selling program for advisory teams shifting from transactional service delivery to strategic engagement

Organisation

State government authority, specialist advisory and client services division

Participants

Client-facing advisers across multiple specialist teams

(advisory professionals who identify as non-sales)

The opportunity

The division's advisers were already consultative in spirit. But the organisation's strategy required a shift to strategic, value-led partnerships, and the team didn't have the frameworks to support it.

Capacity pressures, expanding roles, and siloed communication were making consistent client delivery harder. Clients expected immediacy. Teams had limits.

The program was an opportunity to formalise and sharpen natural strengths with practical tools and shared language.

The approach

A structured program across five phases: Connect, Collaborate, Create, Confirm, and Commit. Language and framing were deliberately advisory rather than sales-oriented, reflecting what discovery sessions surfaced about the team's identity.

A pre-program awareness session shaped the scenarios used in the workshop. The in-person program used role-plays built from actual client situations, behavioural assessments, a Strategic Planning Canvas, and structured objection-handling frameworks.

A coaching session for people leaders gave managers tools to reinforce the learning in practice. An accountability session post-program tracked real-world application and impact.

"I really loved the session, getting some time to work and collaborate with other teams, share ideas and understand their domain and scope. Something I'd like to do more, to add value and deliver impact to the organisation as a whole."

Relevant Feedback

86%

VoC Score

93%

Skills covered applicable to role

97%

Facilitator engagement and expertise

Key outcomes

28%

Client relationship depth improvement

16%

Client satisfaction score uplift

30%

Adviser confidence in strategic conversations