

A light blue silhouette of a world map is centered in the middle section of the page, serving as a background for the main text.

# Taking It to the Next Level

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## Overview

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## Anecdotes

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All good stories have a \_\_\_\_\_, a \_\_\_\_\_ and a hero who

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Rules for anecdotes:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

***“If you tell the truth, you don’t have to remember anything!”*** — Mark Twain

## Big Five Financial Services Benefits

Make \_\_\_\_\_

Save \_\_\_\_\_

\_\_\_\_\_ Money

\_\_\_\_\_ Money

Save \_\_\_\_\_ and Offer \_\_\_\_\_





## Anecdote Scriptwriting Clinic

Write a story, in the first person, describing how you recently helped resolve a client's/ member's or prospect's problem, or fulfilled a need. Be truthful, not boastful, and include:

- An introductory line
- A description of the protagonist (client/member/prospect)
- A brief description of the conflict (client/member/prospect need)
- An explanation of the conflict resolution (how you resolved the issue)

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## Prospect-Adjusted Language

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Macro Marketing \_\_\_\_\_

Prediction Technique \_\_\_\_\_

Trade Magazine Principle \_\_\_\_\_

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## Use of Support Materials

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Running the Calendar \_\_\_\_\_

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***“Brochures and other information can help sell products, but only with your involvement!”***

## Doubt-Creating Questions

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## Doubt-Creating Questions Scriptwriting Clinic

Write, in the first person, four or five doubt-creating questions to ask a client/member/prospect who says, *“Everything is fine.”*

The questions should:

- Be appropriate to the area of the bank/credit union in which you work
- Create doubt in the client’s/member’s/prospect’s mind
- Require more than a single-word answer
  - An example would be *“Tell me what frustrates you about having multiple investment accounts?”*

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_

## Additional Advanced Techniques

Listerine Technique \_\_\_\_\_

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Immunization Technique \_\_\_\_\_

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Proofs \_\_\_\_\_

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Numerization Technique:

- **Pricing is in your favor:** Multiply the \_\_\_\_\_ of the savings over the lifetime of the product.
- **Pricing is not favorable:** Calculate the \_\_\_\_\_ in the costs between your product and your competitor's and break down the difference to a daily, weekly, or monthly value.

Preemptive Strikes \_\_\_\_\_

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Self-Disclosures \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Value-Added \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





## Putting It All Together! Scriptwriting Clinic

Write a first-person script that would create an interest with a client/member/prospect for one of the below scenarios. Please use the space provided on the following page.

There are a few assumptions!

- The client's/member's/prospect's needs have already been analyzed.
- A diagnosis was made.
- You know that your treatment plan is in the client's/member's/prospect's best interest.

Utilize the Four Steps of Scriptwriting:

- Brainstorm the Bullet Points/Headlines
- Reduce the Bullet Points/Headlines to the Big Five and Rank
- Develop each Bullet Point/Headline
- Construct a First-Person Script

Your scenario choices:

### **Scenario One:**

Client/member wants to close their savings account to consolidate all of their banking with a competitor.

### **Scenario Two:**

Client/member has \$15,000 they want to put into a savings account, but should consider a higher interest vehicle.

### **Scenario Three:**

Client/member has high-interest credit card debt.



