



Tellers Drive to the Bottom Line

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Tellers Drive to the Bottom Line

Profile of the Teller

Using the Client's/Member's Name

Workshop: Discovering the Client's/Member's Name with Introduction



Workshop: Discovering the Client's/Members Name Asking for Pronunciation

Creating Awareness Through Tag-Ons

Big Five Financial Services Benefits

1. _____
2. _____
3. _____
4. _____
5. _____



Tag-On Scripting

Please identify the type of Tag-On, the product or service you might suggest, and then create a Tag-On which includes the benefit of the product.

1. Mrs. Clark mentions that they are going to their granddaughter's college graduation out of state in June and to their grandson's wedding (also out of state) in August.

Type of Tag-On: _____

Product or Service: _____

Tag-On: _____

2. Ed Garcia is at your window to make a deposit from their payroll check and asks, "Are you always so busy at 4:00 on Friday?"

Type of Tag-On: _____

Product or Service: _____

Tag-On: _____

3. Your bank/credit union is running a home equity line promotion that is Prime minus 1%.

Type of Tag-On: _____

Product or Service: _____

Tag-On: _____

4. Tina King comes to your window with her hands full – she has her wallet, her banking for her wallpaper hanging business, her personal loan payment, and a pile of bills that she will be dropping off at the post office.

Type of Tag-On: _____

Product or Service: _____

Tag-On: _____

5. You pick your own based on a current campaign that is occurring at your organization.

Type of Tag-On: _____

Product or Service: _____

Tag-On: _____



Making a Referral

The sales professional is there and available.

The sales professional is not there or not available.

You are not able to set the appointment.



Scriptwriting on Making the Referral

In all cases, the client is interested in the product you suggest but you will need to script as indicated on your worksheet.

1. Mrs. Clark mentions that they are going to their granddaughter's college graduation out of state in June and to their grandson's wedding (also out of state) in August.

- a. Mrs. Clark has time to speak right now with an available sales professional. You will be walking Mrs. Clark over to the sales professional.

2. Ed Garcia is at your window to make a deposit from their payroll check and asks, "Are you always so busy at 4:00 on Friday?"

- a. Ed is on the way home to get ready for his son's ballgame but would like someone to call him.

3. Your bank/credit union is running a home equity line promotion that is Prime minus 1%.

- a. Your sales professional is busy right now but your client would like to speak to someone about the promotion.

4. Tina King comes to your window with her hands full – she has her wallet, her banking for her wallpaper hanging business, her personal loan payment, and a pile of bills that she will be dropping off at the post office.

- a. Tina does not have time right now but would be willing to set up an appointment.



5. You pick your own based on a current campaign that is occurring at your organization.
 - a. Your client/member has time to speak with someone. The sales professional is available but you have a line of clients waiting at the teller area.

More	
Better	
Different	
Less	

