



Primed Referral Worksheet

Objective of today's call:

1. What is a warm hand-over?
2. Preparing for the follow-up call
3. Scripting an entry line for a primed referral

Warm Hand-Over

Conferencing-In Technique

Callback Technique

Warm Hand-over Definition



Gather the Data

Analyze the Data

Examine the four categories of financial needs for any unmet needs.

Credit

Deposit and Investment

Day-to-Day Banking



Other Financial Services

Additional Clues

Wave the Magic Wand...What do you want to accomplish during the call?

Key Elements for Entry Lines

1. Greet the client/member using _____
2. Identify _____ with title, bank/credit union, and location and your connection to the referral source
3. Reference the lead data and _____ accuracy
4. Ask to discuss the lead, linking it to the client's/member's _____ goal and objectives
5. Provide a _____ frame for the call



Case Study

What YOU know:

Client/Member: Rex Cain – age 51, accountant with a well-known firm;
annual income of \$140,000

Accounts with Bank/
Credit Union Checking with average balance of \$3,000
Savings with average balance of \$7,800

Accounts Opened: Two years ago

Delivery Methods: Branch and ATM withdrawals

Personal Data: Children: Paul – age 29 and Emma – age 27

Hobbies: Hiking, sailing, and reading

Partial profile completed

