



Improving Your Teleconsulting Sales Professional Role-Play

Sales Professional Role-play

What you know about the client/member:

Client/Member: Nancy Elms – Age 48, Nurse
Larry Elms – Age 50, Manager of a research firm

Accounts with your financial institution:

- Car Loan with \$6,000 balance; 18 months remaining
- Credit Card with the balance paid each month

Relationship Started: Two years ago

Channels Used: Branch

Income: Nancy – approximately \$85,000 annually
Larry – approximately \$75,000 annually

Personal Profile: Children: Janie – 26; Rachel – 24; Aaron – 23; Peter – 21
Hobbies: Nancy enjoys yoga and quilting; Larry plays golf; they both enjoy antique shopping

Last Profile: Partial profile by your colleague, Julie, at time of loan closing

