



The Question Is...?

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Categories

1. Borrowing
2. Day-to-Day Banking Services
3. Savings
4. Other Financial Services
 - Investments / Trust / Insurance / Financial Planning / Small Business

Big Five Financial Benefits

- Lend Money
- Make Money
- Save Money
- Protect Money
- Save Time / Offer Convenience

Techniques

Given Reality Test

Litany Technique

Numerization Technique

Anecdotes

Indirect Badmouthing

Bandwagon Technique



Three Buyer Types

- 1. Predisposed Buyer
- 2. Information Gatherer
- 3. Rate Shopper

Predisposed Buyer

A predisposed buyer will ask for what they want.

Scenario 1

A 35-year-old predisposed buyer, Janice McDaniel, would like to open a savings account with a \$28,000 cashier's check from another organization which says Mary Smith Estate in the memo line.

What are the questions you will ask Janice who does not have accounts with your organization?

Category: Bank / Credit Union Savings

The Clue is: _____



Category: _____

Category:

Category:



Category: _____

Category:

Category:



Rate Shopper

The rate shopper is normally price motivated.

Scenario 3

Sara Stevens, age 25, calls (or comes into your branch) and asks, "What is your 25-month certificate of deposit rate?"

What are the questions you will ask Sara who does not have accounts with your organization?

Category: Bank / Credit Union Savings

The Clue is: _____



Category: _____

Category:

Category:



Category:

Category:

