Conducting Hidden Clues Clinics

Objective of Workshop

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First Step: Brainstorming the Clues

What is _____, _____, or

_____. Also, technology or data clues.

_____

_____

_____

Step Two: The Five Most Common Clues

Voting Method

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_____

_____

_____

_____

Step Three: Scriptwriting Clinic

"Anxiety is the price you pay for the unprepared mind and mouth."

Tag-On: Unrelated and Related

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Tellers: *"Has anybody told you about how you can make more money on your funds with our new CD rate special? I'd like to introduce you to a knowledgeable banker who will tell more about the specials."*

Bankers: *"Has anybody told you about how you can make more money on your funds with our new CD rate special? It will only take me a couple of minutes to tell you more about this special if you have time."*

Benefit vs. Feature

_____

_____

Big Five Financial Benefits

Make _____

_____ Money

Lend _____

_____ Money

Save _____ or Offer Convenience

Test the Tag-On with a Couple of Questions

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Step Four: Making a Referral with a Warm Hand-Over

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"Mr. Garcia, Sara will call you on your cell phone number 111-111-1111 this afternoon at 2:00."

Warm Handover

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"Mr. Garcia, I would like to introduce you to Sara who is a specialist in dealing with our various deposit products. Sara, Mr. Garcia is interest in our Fall CD specials. Thank you Mr. Garcia."

Step Five: Role-Play

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Steps to Conducting Hidden Clues Clinic

1. Brainstorming all clues
2. Reduce and rank to top five clues heard in your branch
3. Scriptwriting Clinic for Related Tag-Ons
4. Making a Referral with a Warm Handover
5. Role-Play

Brainstorm All Clues

	My Clues	Additional Clues from Others
Says		
Asks		
Does		
Technology and Data		

Top Five Clues

1	
2	
3	
4	
5	

Scriptwriting Clinic

Clue #1 _____

Tag-On Script

_____

_____

_____

Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

_____

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Clue #2 _____

Tag-On Script

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Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

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Clue #3 _____

Tag-On Script

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Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

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Clue #4 _____

Tag-On Script

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Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

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Clue #5 _____

Tag-On Script

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Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

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7

Proven Best Practices

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Take-Away Action for today…conduct a Hidden Clues Clinic in the next two weeks.