

A light blue silhouette of a world map is centered in the middle section of the page, serving as a background for the title text.

# Digging Deep into Probing Questions

## Big Financial Benefits

Make \_\_\_\_\_

\_\_\_\_\_ Money

\_\_\_\_\_ Money

Protect \_\_\_\_\_

\_\_\_\_\_ Time and Provide \_\_\_\_\_

The features are the details but the benefit expresses what's \_\_\_\_\_  
\_\_\_\_\_ me!!

Fill in the blanks with benefits.

- Internet banking allows you to access your funds 24/7 which \_\_\_\_\_.
- You won't have to carry unnecessary cash when you utilize a debit card which \_\_\_\_\_.
- Our special savings pays a compounded APY of 3.5% which will \_\_\_\_\_ on your deposits.
- You will \_\_\_\_\_ by paying your bills with our on-line bill pay.
- We have many ways you can have access to funds to pay for repairs to your roof by \_\_\_\_\_ you money with our quick approval process.



## Probing Questions

A closed-ended question can only be answered with \_\_\_\_\_ or \_\_\_\_\_.

e.g., Do you own your home?

An open-ended question requires an \_\_\_\_\_ response.

e.g., How have you used the equity in your home in the past?

Ask enough open- and closed-ended questions until you can make a proper \_\_\_\_\_.

Credit	
Open- and Closed-Ended Questions	Responses
Can you make a recommendation(s)? What is it?	



Deposit / Investment	
Open- and Closed-Ended Questions	Responses
Can you make a recommendation(s)?	
What is it?	



## Day-to-Day Banking

Open- and Closed-Ended Questions	Responses
<p>Can you make a recommendation(s)?</p> <p>What is it?</p>	



# Note Taking and Follow-Up

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# Action Plan

	What?	How (How Much)?	By When?
More			
Better			
Different			
Less			

