

A light blue world map is centered in the background of the slide, showing the continents of North America, South America, Europe, Africa, Asia, and Australia. The map is rendered in a simple, flat style.

Conducting Hidden Clues Clinics

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Objective of Workshop

First Step: Brainstorming the Clues

What the client/member may _____, _____, or _____ . Also, technology or data clues.

Step Two: The Five Most Common Clues

Voting Method



Step Three: Scriptwriting Clinic

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

Tag-On: Unrelated and Related

Tellers: *“Has anybody told you about how you can make more money on your funds with our Spring savings rate special? I’d like to introduce you to a knowledgeable banker who can tell you more about our specials.”*

Bankers: *“Has anybody told you about how you can make more money on your funds with our Spring savings 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

Borrow (Lend) _____

Make _____

_____ Money

_____ Money

Save _____ or Offer Convenience

Test the Tag-On with a Couple of Questions



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

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

Warm Hand-Over

“Mr. Garcia, I would like to introduce you to Sara who is a specialist in dealing with our clients’/members’ needs. Sara, Mr. Garcia is interested in our Spring savings special. Thank you, Mr. Garcia.”

Step Five: Role-Play





Steps for Conducting Hidden Clues Clinics

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 Hand-Over
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



Clue #2 _____

Tag-On Script

Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

Clue #3 _____

Tag-On Script

Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script



Clue #4 _____

Tag-On Script

Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script

Clue #5 _____

Tag-On Script

Making a Referral with a Warm Hand-Over

Refer To: _____

Warm Hand-Over Script



Proven Best Practices

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

