

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.

Digging Deep into Probing Questions

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Big Five Financial Services Benefits

_____ Money

Make _____

_____ Money

Protect _____

_____ Time and Offer _____

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 a limited response.

- Do you own your home?
- What is your address?

An open-ended question requires an _____ response.

- 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?	

Deposits/Investments	
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
Can you make a recommendation(s)? What is it?	



Small Business	
Open- and Closed-Ended Questions	Responses
Can you make a referral or recommendation(s)? What is it?	



Quadrant Note-Taking



Follow-Up Events

Client/Member-Generated Window of Opportunity

Organization-Generated Window of Opportunity

Competitor-Generated Window of Opportunity

Economy-Generated Window of Opportunity

