

## T Trust

Build trust. Ask for names. You'll help them. Set expectations.



*"Hi. I'm \_. And you are? I'd love to help you. Let me get you to the expert. This will take a few minutes. I can find out and call you back. Or would you like to wait? What's a good contact number?"*

## A Ask

Start with one or two open-ended questions.



*"Tell me about yourself/your business. What's going on? Who is your banker? What tools do you use to manage your money? Tell me more."*

## L Listen

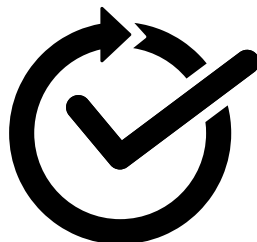
Actively listen. Eye contact. Turn off distractions. Nod. Paraphrase. Clarify. Take notes.



*"Based on what you told me, \_ is important to you. What else? Did I miss anything?"*

## K Know

Know what the best solution is for the customer. Know how to educate and advise, based on their needs.



*"I have a solution that will help you save you time and money. Would you like to hear more about it?"*

**REMEMBER TO T.A.L.K. TO  
EVERY CUSTOMER. EVERY EMPLOYEE. EVERY TIME.**