



Sample Finance Conversation Starters

Unplanned Meeting

Hello, George, my name is Joe SalesRep and I represent TopNotch Solutions. I've helped several banks in the Boston area improve operational efficiencies by integrating their voice and data networks.

George, yesterday I got a call from the CIO of a bank I worked with last year. We helped him integrate voice and data in four of his branch locations, and he told me that his costs have gone down tremendously since the deployment. Long distance calls between branches are essentially free now, and he doesn't need to send a technician out to add or change phone features—it's all done remotely. Plus, by centralizing the voice system, he's able to staff just one loan officer to service all four locations. Now he wants to implement the network across his other eight locations.

George, does your bank have plans to combine voice and data traffic onto a single network?

Planned Meeting

Thanks for taking the time to have lunch with me today, Alice. My objective for our first meeting is to learn more about you and your business, and to address any questions you might have about me or my company. How does that sound to you?

What would you like to accomplish during our discussion today?

So, Alice, tell me what you enjoy most about your job.

Alice, what do you see as the top two or three challenges for your company this year?

I hear you! I've seen clients struggle with those same challenges...



Introductory Call Script – Finance Sample

NOTE: This Introductory Call Script presents a different style, in which the Sales Rep asks for the appointment early on, and only delivers more detail about “pain points” and solutions if the prospect objects to the initial appointment request. A similar style may be applied to the other vertical market samples, simply by inserting the appointment request up-front, for individuals who prefer such an approach.

Hello, Miss Prospect, I’m Joan SalesRep from TopNotch Solutions in Peoria. We’ve been very successful helping banks in Peoria improve operational efficiencies and customer service by integrating their voice and data networks. The reason I’m calling you today is to schedule an appointment so that I can tell you about the success we’ve had with other banks.

I’m sure that you, like the CIO of First Bank of Peoria, are interested in maintaining efficiencies while offering superior customer service.

That’s great, Miss Prospect! I think we should get together. How’s Wednesday at 2:00?

Objection: No thank you. We don’t see a need to integrate our networks right now.

That’s what several of our clients thought—before they had a chance to see how much we saved other banks. For instance, one bank was staffing a loan officer at each branch—until we showed them how a centralized voice communication system would enable a loan officer at one location to service multiple locations.

Miss Prospect, let’s get together so we can discuss your bank’s business needs and how we’ve helped banks with similar needs. Is Wednesday at 2:00 convenient for you?

Objection: I see what you mean, but a big project like that would be too expensive.

Integrating your voice and data networks doesn’t have to be done all at once. We can help you prioritize your needs, and integrate where it makes the most sense. My first banking client upgraded four locations initially, and added a few every six months. With the initial cost savings, they were able to fund part of the remaining upgrades. I’d like to learn more about your business needs so I can offer you a plan for upgrading at a pace that’s right for your bank. **Shall we meet Wednesday at 2:00?**

Objection: We’re satisfied with our current voice vendor, so I’d like to give him this business.

I’m just curious. Are you using a MajorVendor system?

Customer Response: No, we’re using the OtherMajorVendor system.

Very good! Our integration solutions complement the OtherMajorVendor system, and the thing that differentiates us from voice vendors is our data background. Our forte is bringing together voice and data technology in a multi-location environment. We really should get together. **Let’s meet Wednesday at 2:00, all right?**

Great, Wednesday at 2 it is. Thank you, I look forward to meeting with you then.



Finance Outbound Voicemail Samples

Sample 1:

Mrs. Prospect, my name is Joe SalesRep and I represent TopNotch Solutions, a networking consultant in Peoria. One of my clients, ABC Bank, lowered its long distance costs 24% and improved customer service by standardizing its six locations on a single IP telephony platform.

I will call you today at 3:30 to set up a time when we can meet to discuss your business challenges and some strategies to address them. Or, you can reach me at 999-999-9999. I look forward to speaking with you!

Sample 2:

Mrs. Prospect, my name is Joe SalesRep and I represent TopNotch Solutions, a networking consultant in Peoria. Did you know that ABC Bank staffs one loan officer to service multiple locations? They recently centralized their voice communications system across six branches, so customers calling their local branch for loan information may be connected to an expert in another branch, transparently to the caller.

I focus on helping financial institutions improve their customer service while streamlining efficiencies by optimizing voice and data networks. I will call you Tuesday morning to set up a time when we can discuss your business challenges and some strategies to address them. Or, if you prefer, you may call me at your convenience at 999-999-9999. Thank you for your time.



Finance Inbound Voicemail Samples

Sample 1:

This is Joe SalesRep of TopNotch Solutions. Thank you for calling me today. I am interested in understanding your business challenges, and demonstrating how our solutions can help you provide superior customer service while improving operational efficiencies. Please leave your name, number, and the best time for me to contact you. I'm eager to speak with you!

Sample 2:

This is Joe SalesRep of TopNotch Solutions. Thank you for calling. I'd like to speak with you about your business goals, and then show you how our solutions can help you achieve them. Please leave your name, number, and the best time for me to contact you. I'm eager to speak with you!



Follow-Up Letter: Financial Sample

September 12, 2005

Miss Jill Prospect
Bank Manager
LoansRUs Bank
2468 Main Street
Yourtown, ST, 02468

Dear Miss Prospect:

I left a message with your assistant, Miss Clark, last Thursday, about how we have helped banks like yours improve their operations. For instance, we recently helped ABC Bank provide a consistent customer experience across diverse branches by converging voice and data traffic onto a single, easy-to-manage network. ***Here's why you should consider a TopNotch solution:***

The growth of Internet banking has resulted in increased competition **and decreased customer loyalty**. **Inefficient** operations lead to **higher costs, unattractive rates**, and sometimes **frustrating customer experiences**. If your products are not competitive, and your service delivery is no more than adequate, your customers will migrate towards a competitor offering superior service. Without a future-proof plan for increasing efficiencies and improving service levels, your bank risks **losing business** to one or more progressive competitors.

TopNotch Solutions offers flexible, scalable convergence solutions that can be introduced into your network at your own pace. Proven TopNotch solutions enable you to communicate multiple types of information—including voice and data—across various locations as inexpensively as possible. And they are geared specifically for multi-location businesses like your bank.

Here are three significant business improvements you can expect with a TopNotch solution:

- **Minimize costs while maximizing service:** By standardizing branches on a single voice platform, you reduce branch-to-branch communications costs, while centralizing network management. Plus, a product expert in one branch can easily service customers who bank at another branch.
- **Streamline network management:** Graphical user interfaces enable remote diagnostics and changes, reducing the need for system engineers to travel to each site and minimizing downtime.
- **Provide a seamless customer experience:** Whether visiting a branch located in a supermarket, calling a remote branch, or accessing online banking, your customers will receive consistent, personalized service.

Experienced professionals like you know how important it is to differentiate products and services, in the wake of increased competitiveness across the banking industry. Forward-looking financial institutions view a converged network as the platform for providing **superior, personalized service** while **maintaining efficiencies**. *Banks that neglect to modernize their networks by integrating voice and data risk incurring higher costs than their competitors—and jeopardize their ability to attract and retain profitable customers.*

I will call you next week to set up an appointment, so you can see first-hand how the right TopNotch solution can improve your operations. Or you can reach me at 999-999-9999. I look forward to meeting with you personally.

Sincerely,

Joan SalesRep
Mid-Atlantic Sales Manager
TopNotch Solutions, Inc.

P.S. TopNotch consultants are known for their expertise in voice and data.

Our clients know what a difference this makes!

P.S.S. Let's meet soon—*we're offering a complimentary business needs analysis this month!*



Finance Email Sample

Note: This sample assumes solution provider has a free offer (business needs assessment) and a white paper or other web page to visit, providing further information about the benefits of converged networks to the banking industry

Subject line:

Differentiate customer service across channels

Body:

Respond by September 30 to schedule your complimentary business needs assessment!

ARE YOU SERVICING YOUR CUSTOMERS EFFICIENTLY AND CONSISTENTLY?

Dear Mrs. Prospect,

Better rates and superior service. Customers demand both—or they'll find another bank that can deliver both. How consistent is your customer service delivery across all branches? Are your operational costs restricting your ability to offer competitive rates?

[Click here to learn more about solutions that help streamline banking operations](#)

Progressive banks are investing in future-proof network technology that enables them to streamline efficiencies, improve customer service, and keep costs down. Convergence technology, which integrates voice and data traffic onto a single network, creates the ideal platform for differentiating products and services—and attracting and retaining loyal, profitable customers.

TopNotch Solutions has worked with multi-location banks to improve efficiencies while providing a consistent customer experience across all channels. Our methodology is designed to introduce convergence at the pace that fits your business needs. And now through the end of September, we are offering a complimentary assessment of your business needs to help you identify areas that would benefit immediately.

[Click here](#) to learn:

- how standardizing branches on a single platform improves responsiveness
- ways to reduce network downtime—even at remote branch locations
- how our modular approach enables you to upgrade at your own pace
- why you don't have to get rid of existing systems to reap the benefits of convergence

Customers expect access to information and bank personnel—at their convenience. Network downtime, inconsistent self-service options, and delayed responses from bank staff can turn valuable customers away.

EARN YOUR CUSTOMERS' LOYALTY.

CALL TODAY—to create a seamless, responsive experience customers can bank on.

Joe SalesRep
Mid-Atlantic Sales Manager

P.S. To schedule your complimentary assessment *today*, call me at 999-999-9999.