



Phrases to Adopt

Why these phrases?

Positive, open-ended language invites conversation, uncovers needs, and shows genuine care. Use these prompts to deepen rapport, discover opportunities, and deliver wow-level service.

Category	Try saying...
Open the Conversation	“Welcome in! What brings you by today?” “What’s been the highlight of your day so far?” “Tell me more about that...”
Understand & Clarify	“Let me make sure I understand correctly...” “I’m not sure if anyone has shared this with you yet, but...” “How may I assist you further?”
Offer Ideas & Solutions	“I have an idea that might help...” “Here’s something many members find useful...” “If you like, I can gather a bit more information and get that started for you.”
Show Appreciation	“Thank you for choosing [Credit Union/Bank Name] .” “We appreciate your loyalty and trust.” “It’s my pleasure to help you today!”
Explore Relationship Needs	“What do you value most about your current banking experience?” “Our goal is to simplify every part of your financial life—what else can we take off your plate?”
Gain Commitment	“Does this sound like a good fit for you?” “Our goal is to simplify every part of your financial life—what else can we take off your plate?” “What’s keeping us from getting started today?” “What can I do right now to earn your business?”
Close & Keep the Door Open	“What else can I assist you with before you go?” “I’ll follow up with you by [time/day] to be sure everything went smoothly.”

Tip: Pair these phrases with genuine curiosity and active listening for best results.