



MAKING THE MOST OF ITMS IN YOUR BRANCH

Interactive Teller Machines offer great long-term benefits for in-store branch locations. ITMs can offload simple transactions and allow Financial Representatives to spend more time with customers and members who need more in-depth financial services. Here are a few tips to introduce the ITM to your customers and members.

- Implement consistent Business Development Time. Have employees take turns conducting “See You Out Front Time”. A high energy and excitement about the new technology can be contagious. Keep it exciting! The employee conducting “See You Out Front Time” is a Concierge for the branch. Create a fun title for when employees are out front.
- When members/customers come into the branch, a team member greets the person and inquires, “What brings you in today?” More in-depth financial transactions will be referred to a Financial Service Representative. Introduction of the ITM will be made for basic transactions.
- The team member demonstrates how to process their transaction at the ITM. Once the ITM representative appears on the screen a personal introduction can be made. It helps tremendously when the fear of the machine is taken away. The more comfortable they are with the machine, the more likely they will use the ITM on their next visit to the branch. They are more apt to ask questions if they know the ITM representative.
- Conduct Fun Contests/Branch Activity for Members and Non Members
 - A Register to Win prize at the branch provides an opportunity for anyone to stop by and enter the drawing. This provides contact information of potential customers for the team member to follow up.
 - Any Member/Customer that takes the time for a demonstration or conducts a transaction can have multiple entries for the drawing.
- Conduct Fun Contests for Branch Team Members
 - A Team Member’s name goes into a drawing for a prize with every demonstration they conduct.
 - If a new customer/member is obtained, they are allowed multiple entries.
- Utilizing Marketing Message Board
 - Ask ITM trivia questions.
 - Have a message board with a question:
 - Have You Met Suzy? (The person they will talk with from the call center.)
 - Did you know? (Did you know you can do all of your transactions at the ITM and also have a live person to talk to?)
 - Have you entered our drawing for a prize yet? (Multiple drawing entries are allowed by viewing a demonstration.)
- When people stop and engage don’t forget to:
 - Use your 20-Second Commercial about the bank/credit union.
 - Utilize Rapport Building Conversations.
 - Utilize the FSI Philosophy “Make a Friend, Make a Customer®”.
- Be a part of store huddles to make the retail employees aware of your financial institution. Ask if you can host a meeting for their employees to demonstrate the ITM.