

Banking & Finance – Customer Advisory

****Opener (Human + Relatable)****

Hi, this is Sarah from Spark AI. Many bankers I talk with say they want more time for client advisory, but admin tasks get in the way. Do you feel that too?

****Diagnostic Question****

How much time do your advisors spend on admin tasks each week?

****Solution + ROI Pitch****

We run a 90-minute AI Accelerator where we show teams how to automate these workflows. That usually saves 200+ staff hours within two months and cuts process times by 40–50%. If it doesn't, we refund the fee.

****Proof Point****

One investment firm boosted advisory time by 35% after automating reporting and data entry.

****Close****

Would you be open to mapping your top 2–3 workflows on a short Zoom? I can do Tuesday morning or Wednesday afternoon — which works better for you?

****Objection Handling****

If prospect says 'Email me': "Of course. Just so I send the right info, which part of this process slows you down the most?"

If prospect says 'No budget': "Totally understand. Most clients cover the workshop from the first workflow we automate. If we don't find savings, you keep the roadmap free."