Cohen Brown Performance Results Network
2016 Third Quarter Calendar of Events

PLEASE NOTE: All sessions will occur according to the schedule below, unless
designated as a Facilitator Session or specifically noted by times listed below the description.

Times of All One-Hour Sessions: (Unless otherwise noted)
8:30 AM – 9:30 AM Pacific Time
10:30 AM – 11:30 AM Central Time
11:30 AM – 12:30 PM Eastern Time

Retail Sales Process Core

Process Reinforcement for Sales Leadership

Inspecting Plans
“If you fail to plan, you plan to fail.”
Coach John Wooden

July 7

A sports coach might refer to the “play,” which is the plan to take one or more skills to achieve a specific outcome. Plays and plans include three critical components: what, how much, and by when.

We will be looking at “inspecting what you expect” within plans to create actions that will take client/member relationships to World-Standard levels.

Providing Coaching Feedback

July 26

Observation without observational feedback is useless. Learn the steps to a successful coaching session, how to handle the obstacles, and how to implement the next steps to improve your team’s skills.

Time Management
Your Most Valuable Resources: Time and People

July 19

Time and again, our clients state that they don’t have enough of these valuable resources. We can assist you in leveraging what you do have by ensuring that your time, and your people’s time, is spent on the most powerful actions that will immediately impact results and service quality. Learn key tactics to maximize your time and energy and to assist you in getting your priorities completed.
Conducting Scriptwriting Clinics

August 2

The steps to scriptwriting are critical to creating language that will convince your clients/members/prospects of your message but will also convince YOU of your message. We will work on these steps and create scripts for some of your most common concerns.

Utilizing Power Triads

August 23

During this session, a checking account campaign scenario will be presented, and participants will walk through each step of the Power Triad – Big Fives, Scriptwriting, and Objections. In addition, Tag-Ons will be created for the campaign.

Maximizing Referral Generation

August 24

This session focuses on maximizing referral opportunities, the multiple sources for those opportunities, and the best techniques for uncovering referral opportunities.

Positive Communication for Managers

30-Minute Session

August 25

It is not just what you say, but how you say it that can make a tremendous difference in how your employees and others perceive you. This workshop will discuss how to turn negative phrases into positive phrases so that employees are receptive to decisions, feedback, and information you discuss with them.

World-Class vs. World-Standard

September 15

It’s wonderful to be known as an organization that offers good service, possibly even World-Class service. But, the ultimate form of service is World-Standard. This workshop provides those behaviors that will move your front-line staff from World-Class to World-Standard. Raising the bar to World-Standard service will differentiate your organization from others.

Webinar: Improved! What Would They Do?

September 27

The core of the discussion will be based on both in-person and telephone mystery shops. What critical behaviors were missed during these shops? As a manager, where would you focus?

New! It’s More Than Bedside Manner

September 29

Showing kind, friendly and understanding behavior is a great first step in delivering World-Standard client/member interactions. But this session goes beyond as we examine the process that, when used consistently by all tellers in your organization, will give clients/members a consistent and positively differentiated experience.
**Process Reinforcement of Selling Skills**

**Commitment to Follow-Up**

*July 12*

Following up with your clients/members/prospects can be one of the biggest sources of business generation and is the center of World-Standard service. The commitment to follow-up is a behavior that must be embedded with each sales and service professional.

**Meet and Greet**

*July 28*

Your lobby is always full of clients/members, in other words, opportunities. Since opening their accounts, your opportunity to talk to these clients/members has normally been very limited. As you meet and greet, you will find potential opportunities. This session will discuss methods for approaching clients/members and prospects and the hidden clues to look for when greeting them in your lobby.

**Don’t Forget About Investments**

*July 21*

As you review your profiles looking for missed opportunities, you might notice the investments category is often ignored or the amount of information gathered is minimal. We will review how to transition from any category to investments as well as discuss the most important probing questions to uncover clients’/members’ or prospects’ investment needs.

**Client/Member Retention**

*August 4*

Client/member retention begins the moment your new client/member opens a new account. During this session we will discuss methods and strategies to retain clients/members such as campaigns, differentiation, indicators a client/member may be closing an account, and the service factors contributing to the retention of profitable clients/members.

**Tellers Drive to the Bottom Line**

*August 9*

Tellers are being trained to identify clients/members who might want to buy services. This task requires tellers to learn about the various financial products and services the bank/credit union offers so that they can explain them to clients/members and refer interested clients/members to appropriate specialized sales personnel. How to create the awareness will be the focus of this session.

**Creating a Differentiation Statement That Goes Beyond Price**

*August 16*

There is more to a sales experience than price. Not only do clients/members and prospects want to feel that the price is appropriate, but also that the total experience is pleasurable. It goes WAY beyond price: atmosphere, attitude of the employees, the presentation of brochures in a rack, etc. This session will discuss the first impressions your branches make, plus those words that create the difference.
Rural Banking  
**August 18**

Using several case studies and the Mini-FiNAP® process, participants will work on skills to obtain an overview of the entire business, as well as discover information regarding the business structure and financial services the rural client is currently utilizing.

The Core of the Mini-FiNAP – Probing Questions  
**September 13**

Uncovering the known and unknown needs, the current needs, and the future needs of your clients/members/prospects is the core of the Mini-FiNAP. Perfecting your probing questions, listening for clues, and smooth transitions will allow you to make appropriate financial recommendations for your clients/members/prospects. During this session, we will focus on the most effective open-ended and closed-ended probing questions/statements as well as transition lines that will take you from one financial category to the next within the Mini-FiNAP.

It Begins and Ends with the Mini-FiNAP  
**September 20**

How do you start the Mini-FiNAP? How do you make the recommendations? How do you close the conversation? This session will focus on your Introduction and Entry Lines and move to the Recommendations, Follow-Up, Client/Member Orientation Rap, and the Offer to Assist.

Webinar: Handling the Rate Shopper  
**September 22**

Each interaction with a client/member is an opportunity to assist that person with a financial need. Handling the Rate Shopper will focus on how to take this inquiry to a current or future sale.

Sales Champion’s Corner

These sessions are appropriate for those who train others within the organization.

Behavioral Campaigns

**30-Minute Session**  
**July 14**

In this session, we will focus on the behavioral campaigns that should accompany any product campaign. It is essential that the relationship-driven, needs-based focus not be distorted, lost, or misunderstood during a product campaign.

Circles of Five

**30-Minute Session**  
**August 30**

Participants in this session will learn how to effectively use Circles of Five as a means of reward. Best Practices for effective Circles will be discussed.
Call Center Process Core

Call Center Process Overview

By Appointment

All PRN members are invited to this session to learn more about Cohen Brown’s Call Center Series training programs. Leading the Call Center Relationship Management Labs helps managers understand the importance of training their direct reports as a means of achieving success in their call centers, and of resolving any personal issues that impede managers’ ability to lead employees to World-Standard results in the ever-changing environment of a contact center. Part I of the Lab provides representatives and their managers with scripting, practical exercises, and thorough coaching that teaches what to say, how to say it, and how to deal with difficult clients/members through all five phases of a call. It also covers greetings, assessing needs, making appropriate suggestions, and handing off calls to other employees for more complex needs. Part II of the Lab teaches sales representatives what to say and how to say it through the seven phases of the Financial Needs Analysis Profile (FiNAP®). Representatives also learn to consultatively follow through on identified needs and professionally handle objections from all clients/members to increase their close ratios and shorten the sales cycle.

Call Center Solutions Teleconference Series

Topic for each call to be set based on interests and needs of participants.

The Call Center Solutions Teleconference Series brings current issues and challenges for call center managers into an interactive forum through open discussion and workshops. Through these workshops, participants develop solutions and create Implementation Action Plans that are put into action immediately following the call.

Pre-Requisite: Ownership of Call Center Process curriculum

Facilitator Session

Leading Call Center

By Appointment

Leading the Call Center Relationship Management Labs prepares management for facilitating and leading the Call Center Relationship Management Lab, Parts I and II. This session will help managers execute effective coaching and training of their direct reports as a means of achieving success in their call centers, and to resolve any personal issues that impede managers’ ability to lead employees to World-Standard results in the ever-changing environment of a call center.

Call Center Relationship Management Lab, Part I

By Appointment

Modules 1 through 8

Part I of the Call Center Relationship Management Lab focuses on developing a consultative approach to treating callers, and lays the groundwork for service professionals continuing on to sales responsibilities. This session will identify the key messages and workshops in each module and provide facilitators with step-by-step instructions to successfully deliver the training to sales-and-service representatives.

Call Center Relationship Management Lab, Part II

By Appointment

Modules 9 through 12

Part II of the Call Center Relationship Management Lab builds on the foundation of the consultative approach developed in Part I and covers proactive and advanced approaches to utilizing the Three-Step Sales Cycle. This session will identify the key messages and workshops in each module to provide facilitators with step-by-step instructions to successfully deliver the training to sales representatives.
Business Banking Teleconference(s)

Business Banking Teleconference(s) provide timely, topical, and consultative discussions in which Cohen Brown's Breakthrough B2B Banking clients (and their sales champions) can learn and discuss processes and proven best practices that can be implemented immediately in their business banking and commercial lending areas.

Pre-Requisite: Ownership of Business Banking Process Curriculum

Business Banking Process Overview

By Appointment

During this presentation, participants will learn about the content and objectives of Cohen Brown's Breakthrough B2B Banking program. B2B teaches a comprehensive model covering all phases of client/member acquisition, relationship management, and retention, including conducting a comprehensive needs analysis, providing proactive value-added advice, closing sales, and obtaining referrals. It is designed to increase profitable revenue by elevating the sales and relationship management skills of anyone working the business-to-business market. This session is open to all PRN members.

Facilitator Session

Breakthrough B2B Banking

By Appointment

This session is designed to provide maximum comfort for facilitators of Breakthrough B2B Banking. Facilitators will review all necessary components, including how to prepare to facilitate a successful class, the key messages to deliver, and a review of workshop tips. There will be ample time to cover any questions facilitators may have.

Process Reinforcement of Selling Skills

Determining Your Market

September 8

This session allows you to review past and current success with clients/members so you can replicate that same success in the future. Being able to recognize the common attributes and characteristics of your successful interactions with clients/members will allow you to recreate this success.
Breakthrough Service Process Core

Breakthrough Service Teleconference(s)

Breakthrough Service Teleconference(s) provide timely, topical, and consultative discussions in which Cohen Brown’s Breakthrough Service Performance clients (and their sales champions) can learn and discuss processes and proven best practices that can be implemented immediately.

Pre-Requisite: Ownership of Breakthrough Service Process Curriculum

Breakthrough Service Process Overview

By Appointment

This session, open to all PRN members, is designed to illustrate how the techniques and processes taught in Breakthrough Service Performance (BSP) and Leading Breakthrough Service Performance (LBSP) can improve profitable retentions and increase bottom-line revenue. Breakthrough Service Performance teaches that financial services providers must constantly reinforce high service standards, develop a culture of superior service delivery, and involve the entire organization to achieve success. It also shows how to create the perception of service excellence by clients/members through the constant use of micro-behaviors, thereby creating maximum client/member satisfaction and eliminating any possibility of client/member dissatisfaction. Leading Breakthrough Service Performance is the management component to this series, and contains a major emphasis on structured coaching and team-building techniques. It provides an integrated approach to achieving behavioral and attitudinal changes to maximize service performance and client/member satisfaction.

Facilitator Sessions

Leading Breakthrough Service Performance

By Appointment

Leading Breakthrough Service Performance comprises the Leadership, Management, and Coaching component of Breakthrough Service Performance. Facilitators will review all necessary components, including how to prepare to facilitate a successful class, the key messages to deliver, and workshop tips. There will be ample time to cover any questions facilitators may have.

Breakthrough Service Performance

By Appointment

Breakthrough Service Performance introduces process-driven service behaviors for front-line and support staff who will assist in lifting the service perceptions of your external and internal clients/members, driving profits and shareholder value. This session is designed to provide maximum comfort for facilitators of Breakthrough Service Performance. Facilitators will review all necessary components, including how to prepare to facilitate a successful class, the key messages to deliver, and a review of workshop tips. There will be ample time to cover any questions facilitators may have.
# Sessions At-A-Glance

- **Inspecting Plans** | July | 7
- **Commitment to Follow-Up** | July | 12
- **Behavioral Campaigns (30 Minutes)** | July | 14
- **Time Management** | July | 19
- **Don't Forget About Investments** | July | 21
- **Providing Coaching Feedback** | July | 26
- **Meet and Greet** | July | 28
- **Conducting Scriptwriting Clinics** | Aug 2
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- **Business Banking Process Overview** | By Appt
- **Breakthrough B2B Banking Facilitator Session** | By Appt
- **Breakthrough Service Process Overview** | By Appt
- **Leading Breakthrough Service Performance Facilitator Session** | By Appt
- **Breakthrough Service Performance Facilitator Session** | By Appt
- **Call Center Process Overview** | By Appt
- **Leading Call Center Facilitator Session** | By Appt
- **Call Center Relationship Management Lab I Facilitator Session** | By Appt
- **Call Center Relationship Management Lab II Facilitator Session** | By Appt

Registrations can be made online one week prior to the session. If you have any questions or comments, please call 330-879-5474.

To register for 3rd Quarter sessions, click on the REGISTER NOW link beside the individual sessions listed in the 2016 Third Quarter Calendar of Events Registration email. You may contact Cindy Griffith at 330-879-5474 for sessions listed as By Appointment.

Thank you.