Cohen Brown Performance Results Network
2017 First 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 Standard Time
9:30 AM – 10:30 AM Arizona Time (until March 12 then revert to Pacific Time)
10:30 AM – 11:30 AM Central Standard Time
11:30 AM – 12:30 PM Eastern Standard Time

Retail Sales Process Core

Process Reinforcement for Sales Managers

It's More Than Bedside Manner

January 5

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

Coaching Opportunities

January 10

Tracking is vital to the success of our teams. We can ensure that we continue to see improvement if we are reviewing the numbers on a daily, weekly, and monthly basis and using those statistics to focus on the behaviors that will take the results to the next level. During this session, we will analyze results and identify opportunities for coaching.

Leadership That Builds Successful Teams

January 24

The focus during this session will be on the Ten-Step Leadership Model. Each step from Visions to Relationship Techniques allows you as a leader to build a successful team no matter what level you may be managing.

The Big Five Most Powerful Ways to Use the Big Five

February 2

Big Fives are one of the most powerful tools that can be utilized in leadership and management. They allow you to focus on actions that will generate the maximum results. They can also assist your team when providing clients/prospects with the benefits of doing business with your organization. During this session, we will discuss five ways that the Big Five can be used in various situations.

Providing Coaching Feedback

February 7

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.

It's Not Your Father's Banking World

February 28

Remember passbooks, coin-saver pig folders, getting a little pack of Life Savers, or the kid's table with comic books? It is not that simple anymore. During this session, we will discuss the behaviors and actions that will allow future generations to have fond memories of their financial institutions.

Conducting Effective Sales Meetings

March 7

This session will focus on developing the five most effective sales meeting topics that you can present to your team. During the session, participants will be able to benefit from each other's experiences to create lists of topics that will impact their teams and their teams' focus, while considering market conditions.

Positive Communication for Managers

30-minute session
March 21

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.

Embedding Teller Product Knowledge

March 28

The Cohen Brown Law states, "It is never a client's/member's or prospect's responsibility to ask you, to tell you, or to understand anything about financial services, ever. It is your job to educate them."

This session will provide trainers, coaches, sales champions, and branch managers with the methods to embed product knowledge within the teller.

Process Reinforcement of Selling Skills

Commitment to Follow-Up

January 12

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

Teleconsulting Pre-Call Planning for Consumer Clients/Members

January 19

Preparation for Teleconsulting calls is critical to achieving productive outcomes. This session will focus on the most effective method of preparing for your World-Standard calls to clients/members.

Improving Your Teleconsulting

January 26

Improve your teleconsulting calls through focused preparation, entry lines that establish credibility and interest, and proper note-taking. These skills will be discussed during this workshop that will enhance your calls. Please bring a current teleconsulting scenario to the call.

Recognizing Life Events

February 9

This session will review the eight most common life events, and discuss how we can discover the events, make gracious comments, ask probing questions, create an interest, consultatively close, and follow up with the client/member concerning the life event.

Digging Deep into Probing Questions

March 2

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. During this session, we will focus on the effectiveness of open-ended and closed-ended probing questions/statements that take you to the financial recommendations for your client/member/prospect.

Transition Lines

March 16

Being able to transition from category to category with confidence and in a manner that seems logical to the client/member is an essential skill when conducting a Mini-FINAP. This session will focus on clues and Windows of Opportunities that will allow you to transition with ease by addressing the benefits of each category to the client/member.

NEW! Conducting a Hidden Clues Clinic

March 30

A Hidden Clues Clinic teaches your team how to identify specific financial clues from clients/members and the actions to take based on those clues. We will run through the process of the clinic as well has how to script a related Tag-on and a benefit statement to use during a banker conversation.

Sales Champion's Corner

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

ESL One-Day Refresher for Service

30-minute session
January 31

This session will outline the ESL modules that are most pertinent to those in the backroom. This can be used as a refresher or for those new to the Process.

PRB One-Day Refresher

30-minute session
March 9

The structured selling skills your financial services salespeople learned during Proactive Relationship Banking will diminish without proper reinforcement. Participants in this session will lean how to conduct a one-day PRB refresher to review with their financial services salespeople the selling skills learned in PRB.

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 objection7s 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 presented to Call Center Management 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 Sessions

Leading Call Center

By Appointment

Leading the Call Center Relationship Management Labs ("Leading Call Center") prepares management for facilitating and leading the *Call Center Relationship Management Lab, Parts I and II*. This session will help managers to 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 Series 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 to provide future facilitators with step-by-step instructions on how 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 Series 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 future facilitators with step-by-step training on how to successfully deliver the training to sales representatives.

Business Banking Process Core

Business Banking Teleconference(s)

Business Banking Teleconference(s) provide timely, topical, and consultative discussions in which Cohen Brown *Breakthrough B2B Banking* clients (and their sales champions) can learn and discuss processes and proven 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.

Process Reinforcement of Selling Skills

Preparation – Listening – Overcoming Objections: Leading to the Business Close

March 23

This session will discuss how you can position yourself as a "better than the average" Business Banker, as well as improve your results by enhancing your probing questions. Are you really doing it? Everyday? To the best of your ability such that nobody else could step into your position and do it better?

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.

Breakthrough Service Process Core

Breakthrough Service Teleconference(s)

Breakthrough Service Teleconference(s) provide timely, topical, and consultative discussions in which Cohen Brown *Breakthrough Service Performance* clients (and their sales champions) can learn and discuss processes and proven 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* and *Leading Breakthrough Service Performance* 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.

Process Reinforcement of Service Skills

So You Say?

For Those in Service

March 14

This session recognizes what those in support service should and should not say when speaking with others. This session will contain scriptwriting clinics.

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 a review of 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.

PRN Registration Form

Please check off the topics you would like to register for:

❑ It's More Than Bedside Manner	Jan	5
❑ Coaching Opportunities	Jan	10
❑ Commitment to Follow-Up	Jan	12
❑ Teleconsulting Pre-Call Planning for Consumer Clients/Members	Jan	19
❑ Leadership That Builds Successful Teams	Jan	24
❑ Improving Your Teleconsulting	Jan	26
❑ ESL One-Day Refresher for Service (30 minutes)	Jan	31
❑ The Big Five Most Powerful Ways to Use the Big Five	Feb	2
❑ Providing Coaching Feedback	Feb	7
❑ Recognizing Life Events	Feb	9
❑ It's Not Your Father's Banking World	Feb	28
❑ Digging Deep into Probing Questions	Mar	2
❑ Conducting Effective Sales Meetings	Mar	7
❑ PRB One-Day Refresher (30 minutes)	Mar	9
❑ So You Say?	Mar	14
❑ Transition Lines	Mar	16
❑ Positive Communication for Managers (30 minutes)	Mar	21

❑ Preparation – Listening – Overcoming Objections: Leading to the Business Close	Mar	23
❑ Embedding Teller Product Knowledge	Mar	28
❑ ***NEW!*** Conducting a Hidden Clues Clinic	Mar	30
❑ Call Center Process Overview	By Appointment	
❑ Leading Call Center Facilitator Session	By Appointment	
❑ Call Center Relationship Management Lab I Facilitator Session	By Appointment	
❑ Call Center Relationship Management Lab II Facilitator Session	By Appointment	
❑ Business Banking Process Overview	By Appointment	
❑ Breakthrough B2B Banking Facilitator Session	By Appointment	
❑ Breakthrough Service Process Overview	By Appointment	
❑ Leading Breakthrough Service Performance Facilitator Session	By Appointment	
❑ Breakthrough Service Performance Facilitator Session	By Appointment	

Company: ______________________________

Participant: ______________________________

E-Mail: ______________________________

Phone: ______________________________

Please fax completed form to (330) 879-5097 or e-mail to PRNInfo@cbmg.com

Please include your name, the name of the teleconference, and your email address in the body of the e-mail.

If you have any questions or comments, please call Cindy Griffith at (330) 879-5474.

Thank you.