Cohen Brown Performance Results Network
2017 Second 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
9:30 AM – 10:30 AM Mountain Time
10:30 AM – 11:30 AM Central Time
11:30 AM – 12:30 PM Eastern Time

Retail Core Process

Process Reinforcement for Leadership

A Shout Out for the Team

April 4

Knowing how and when to motivate your team can be a skill that we as leaders sometimes ignore. We let the activities of the day take over, and we take for granted that our team knows we appreciate them. This session will focus on what motivates teams and how to build strength in your team.

Positive Presence

April 13

You have found yourself in the middle of a merger, a restructure, a systems change within your organization. As a manager, how do you deal with employees? How do you deal with your own feelings? How do you deal with client/member objections? What opportunities are involved?
During this session, we will discuss: 1) The impact the change has on you as an individual, 2) The impact it has on your employees and how you deal with that, 3) The impact it has on your clients/members.

I THINK They See Me?

April 27

Working at the video teller or the drive-up at times can make tellers feel removed from clients/members. It takes special attention to make the experience a warm one while at the same time providing clients/members with the awareness of the products and services that will improve their financial lives. This session will discuss those techniques as well as how to overcome the obstacles your tellers may be encountering during these interactions.

Inspecting Plans
45-Minute Session

May 9

"If you fail to plan, you plan to fail."
– Coach John Wooden

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.

Dealing with Difficult Employees

May 16

Sometimes, as Dr. Martin L. Cohen suggests, difficult employees can be "ninjas," sabotaging your plans. Many difficult employees are very up-front about their feelings. How do you deal with their personalities and still focus on clients/members, other employees, and your own goals? This session will provide suggestions for overcoming the obstacles that can come with these employees.

No Complaining Zone
45-Minute Session

May 25

Complaining is negative, and negativity causes stress, drains energy, reduces success, and can kill you! Let's talk about how we can create a positive environment that will survive any circumstances.

Embedding New Account Representative Product Knowledge

June 1

This session will provide trainers, coaches, enhanced service champions, and branch managers with the methods to embed product knowledge within the new account representative.

Webinar: Coping with Change

June 8

There must be more pressure to change than resistance to change or the change will never happen. This webinar will examine factors that cause change to be squelched and how to create receptivity to change.

Conducting Scriptwriting Clinics

June 15

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

Honesty in Coaching

June 22

Providing honest feedback to your team ensures that performance levels do not remain stagnant. Constructive feedback is not only right for the employee but is the right thing to do for your clients/members. This session will prepare managers to communicate honestly with their teams as they provide continued coaching.

Process Reinforcement of Enhanced Service Skills

Turning Reactive Requests into Proactive Opportunities

April 6

One of your objectives is to become more proactive instead of reactive when speaking with your current clients/members or prospects. But doing what is right means never selling one penny of what is not needed and every dollar of what they do need. This is done by asking the questions that will uncover not only current needs but future needs, the known and the unknown needs. This also means learning to associate the benefits (make, save, lend, and protect money, and save time) with the features. We will discuss turning reactive requests into proactive opportunities during this session.

Recognizing Life Events

April 11

This session will review the eight most common life events. How do you 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?

Scripting for Primed Referrals

May 4

This session will allow you to script what you want your referral sources to say when making referrals to you and other banking professionals. The session will also focus on creating the perfect entry line that catches the interest of the client/member/prospect when making the follow-up call after receiving the referral.

Taking It to the Next Level

May 11

No matter what you are doing, there comes a time when you are going to want to take things up a notch! The purpose of this session is to enhance your success by learning advanced skills and techniques for creating an interest with clients/members and prospects.

Digging Deep into Probing Questions

May 18

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.

Time Management

Your Most Valuable Resources: Time and People

May 23

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 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.

Tellers Drive to the Bottom Line

June 6

The U.S. Department of Labor anticipated there would be 689,000 tellers by 2016. 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 the appropriate specialist. This session focuses on how to create awareness of these products and services.

Webinar: Improving Your Mini-FiNAP

June 13

This session will be presented via Internet webinar. A Mini-FiNAP demonstration will be conducted. During the session, we will break down the conversation working on the differentiation, transition lines, and appropriate scripting for probing questions.

Why Conduct Business With Us?

June 20

This session focuses on creating a Differentiation Statement that sets you apart from your competition. An ordinary professional will sell price first, but you want to go beyond price and convince a prospect that you are the World-Standard organization with whom they should do business.

Webinar: Handling the Rate Shopper

June 27

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 an immediate or future sale.

Champion's Corner

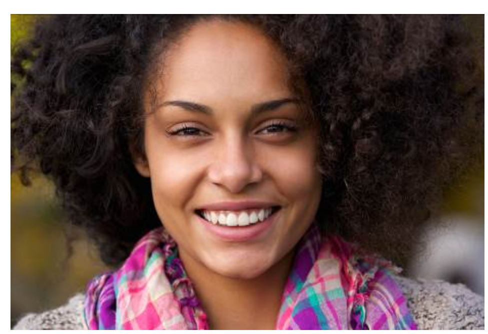
These sessions are appropriate for those who train others within the organization.

Webinar: How to Make Your Clients/Members Smile

30-Minute Session

June 29

The Perfect Hour Lab for Tellers creates an experience for your clients/members that will allow them to walk away with a positive, memorable impression. At the same time, you can increase your closed teller referrals to specialists by 500%. Participate in this webinar to identify management gaps and opportunities to modify existing behaviors within your teller team.



Call Center Process Core

Call Center Process Overview

By Appointment

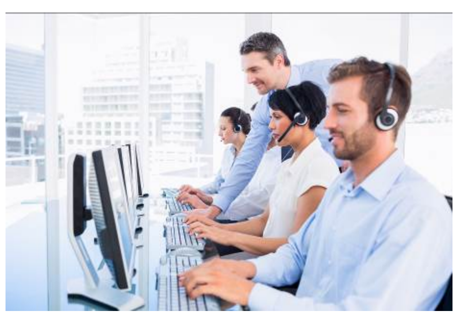
All PRN members are invited to this session to learn more about Cohen Brown's Call Center Series training programs. *Leading the Call Center Relationship Management Labs* helps managers understand the importance of training their direct reports as a means of achieving success in their call centers, and 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 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.

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 enhanced 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 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 representatives.

Business Banking Process Core

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 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 business, and obtaining referrals. It is designed to increase profitable revenue by elevating the relationship management skills of anyone working the business-to-business market. This session is open to all PRN members.

Process Reinforcement of Enhanced Service Skills

Small Business Pre-Call Planning

May 2

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? Every day? 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's *Breakthrough Service Performance* clients (and their 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

❑ A Shout Out for the Team	Apr	4
❑ Turning Reactive Requests into Proactive Opportunities	Apr	6
❑ Recognizing Life Events	Apr	11
❑ Positive Presence	Apr	13
❑ I THINK They See Me?	Apr	27
❑ Small Business Pre-Call Planning	May	2
❑ Scripting for Primed Referrals	May	4
❑ Inspecting Plans (45 Minutes)	May	9
❑ Taking It to the Next Level	May	11
❑ Dealing with Difficult Employees	May	16
❑ Digging Deep into Probing Questions	May	18
❑ Time Management	May	23
❑ No Complaining Zone (45 Minutes)	May	25
❑ Embedding New Account Representative Product Knowledge	June	1
❑ Tellers Drive to the Bottom Line	June	6
❑ *Webinar:* Coping with Change	June	8
❑ *Webinar:* Improving Your Mini-FiNAP	June	13
❑ Conducting Scriptwriting Clinics	June	15
❑ Why Conduct Business With Us?	June	20

❑ Honesty In Coaching	June	22
❑ *Webinar:* Handling the Rate Shopper	June	27
❑ *Webinar:* How to Make Your Clients/Members Smile (30 Minutes)	June	29
❑ 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 2nd Quarter sessions, click on the REGISTER NOW link beside the individual sessions listed in the 2017 Second Quarter Calendar of Events Registration email. You may contact Cynthia Griffith at 330-879-5474 or cynthia_griffith@cbmg.com for sessions listed as By Appointment.

Thank you.