Cohen Brown Performance Results Network
2017 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)

12:30 PM – 1:30 PM Pacific Time
1:30 PM – 2:30 PM Arizona Time and Mountain Time
2:30 PM – 3:30 PM Central Time
3:30 PM – 4:30 PM Eastern Time

Retail Sales Process Core

Process Reinforcement for Sales Managers

Distance Management

July 6

Time management is critical, and finding ways to use our time in the most effective ways is something we are all attempting to accomplish. Distance Management is one solution to time management. This session will provide participants with a clear understanding of how to implement Distance Management for management techniques such as coaching, rounds, briefings/debriefings, skill enhancement, and sales meetings.

Coaching Opportunities

July 13

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.

No Complaining Zone

45-Minute Session

July 27

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.

Sales Meeting Round Robin

August 10

This session will add a little fun while utilizing the Sales Meeting Tip Sheet and Coaching Tool to perfect the Sales Meeting process. Each participant will conduct one portion of the Sales Meeting and then pass on to the next participant.

It's a Marathon, Not a Sprint!

August 25

Breaking down your team's goals into bite-sized pieces allows them to digest those goals and create plans for success. This session will discuss how you assist your team with their plans and how you ensure their time is spent on the most valuable actions for success.

Process Reinforcement of Selling Skills

Creating a Differentiation Statement That Goes Beyond Price

July 11

There is more to a sales experience than price. Not only do clients/members and prospects want to feel that the price is appropriate; they also want to feel that the total experience is pleasurable. It goes WAY beyond price and includes atmosphere, attitude of the employees, presentation of brochures in a rack, etc. This session will cover the first impressions created by your branches plus those words that make the difference.

Working as One

July 18

The fact is that people are what make organizations successful. The success of working as one team depends on each individual overcoming the obstacles that he or she encounters. Overcoming the obstacles will be the focus of this session.

Transition Lines to Day-to-Day Banking

July 25

Being able to transition from category to category with confidence and in a manner that is logical to the client/member is an essential skill for conducting a Mini-FINAP^{SM}. This session will focus on clues and Windows of Opportunities that will allow you to transition with ease to the Day-to-Day Category from each of the other three categories.

Client/Member Retention

August 9

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 or member may be closing an account, and the service factors contributing to the retention of profitable clients/members.

NEW! A Loan, Anyone?

August 17

We will be discussing loans from two perspectives. First, using the scenario of a call or visit from a rate shopper, we will create entry lines that differentiate your organization. Second, we will review transitioning to the Credit Category once a Mini-FiNAP has been gathered in the Day-to-Day Banking and Deposits/Investments Categories.

The Core of the Mini-FiNAP

August 22

Uncovering the known and unknown needs, and the current and 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

August 29

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 Others.

The Royal Road to the Close

August 31

Objections are the Royal Road to the Close. An objection means that the client/member is still engaged in your conversation and really needs clarification. This session will present the Objection Categorizer as a tool to answer the most common objections you face when asking for the business.

In-Person Networking

September 13

Networking can cause so much anxiety for some professionals that they avoid this beneficial technique for increasing their contacts and pipeline. This session will provide you with some tips for networking as well as a planning sheet to allow you to make the most of any networking event.

Webinar: Tag, You're It!

September 28

This webinar will review the types of Tag-ons that can be used by tellers and others with client/member contact. The core of the webinar will allow the participants to create Tag-ons as scenarios appear on the screen.

Sales Champion's Corner

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

Behavioral Campaigns

30-minute session

August 15

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.

Mini-FiNAP Certification

30-minute session

September 7

The Mini-FiNAP process is focused on needs-based selling as opposed to product-based selling. During this session, we will provide the process/steps to be taken to certify sales professionals in the Mini-FiNAP. The certification process ensures that a sales employee can perform an effective Mini-FiNAP with a client/member or prospect, leaving them with the perception of being served, while substantially increasing sales opportunities.

Circles of Five

30-minute session

September 12

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 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.

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 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 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 *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 Selling Skills

Determining Your Market

September 14

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.

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 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 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* 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

July 19

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 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 clients/ members and internal clients/employees, 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 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:

❑	Distance Management	July	6
❑	Creating a Differentiation Statement That Goes Beyond Price	July	11
❑	Coaching Opportunities	July	13
❑	Working as One	July	18
❑	So You Say? *For Those in Service*	July	19
❑	Transition Lines to Day-to-Day Banking	July	25
❑	No Complaining Zone (45 minutes)	July	27
❑	Client/Member Retention	Aug	9
❑	Sales Meeting Round Robin	Aug	10
❑	Behavioral Campaigns (30 minutes)	Aug	15
❑	*NEW!* A Loan, Anyone?	Aug	17
❑	The Core of the Mini-FiNAP	Aug	22
❑	It's a Marathon, Not a Sprint!	Aug	25
❑	It Begins and Ends with the Mini-FiNAP	Aug	29
❑	The Royal Road to the Close	Aug	31
❑	Mini-FiNAP Certification (30 minutes)	Sept	7

❑	Circles of Five (30 minutes)	Sept	12
❑	In-Person Networking	Sept	13
❑	Determining Your Market	Sept	14
❑	*Webinar:* Tag, You're It!	Sept	28
❑	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	

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

Please register online.

Thank you.