Cohen Brown Performance Results Network
2018 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 and Arizona 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 3

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.

Motivation Through Reward and Recognition

April 17

Not only will participants be able to share the methods they are currently using for reward and recognition, but we will discuss the benefit of reward and recognition and how to identify the behaviors that give our team a lift and those that drag everyone down.

Distance Management

May 3

Time management is critical, and finding ways to use our time most effectively is something we are all attempting to accomplish. Distance Management is one time-management solution. 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 focused performance meetings.

Updated! Creating and Inspecting Action Plans

May 10

"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 Best-of-the-Best levels.

Dealing with Difficult Employees

May 17

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.

Coaching Behaviors That Will Improve Results

May 22

As we all know, coaching is a process that is ongoing; it is something that never stops. Think about any professional sports team. The coaching staff doesn't say, "Hey your completions (foul shots, strikes) were really low last week so we want you to throw to the various receivers for the next few hours. We're going to head down to the locker room for some meetings today and we'll check back with you at the end of the day to see how it went." Think that is what happens? Not at all! We will discuss a process that allows the manager to coach the team to obtain positive results.

Conducting Scriptwriting Clinics

May 31

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 12

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 5

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 advising clients/members to proceed with anything they don't need or which is not in their best interests. However, do advise them of every solution (everything) that will truly meet their needs and help them. 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.

Preparing for Teleconsulting Calls During Campaigns

May 1

This session will focus on improving your teleconsulting calls through focused preparation, entry lines that establish credibility and interest, probing questions, and aniticipated objections. A case study will be utilized as the skills are practiced.

Scripting for Primed Referrals

May 8

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 15

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 24

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.

New! If They Say, Then I Say

June 5

Opportunities come up in every interaction we have with our clients/members/prospects, whether it is over the telephone or in person. This session will prepare you to turn a service resolution or product inquiry into meeting the needs of your client/member/prospect.

Tellers Drive to the Bottom Line

June 7

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.

Commitment to Follow-Up

June 14

Following up with your clients/members can be one of the biggest sources of business generation and marks the achievement of Best-of-the-Best service. The commitment to follow-up is a behavior that must be embedded within each sales-and-service professional. You will learn the best times to pre-position follow-up, the four types of Windows of Opportunity that allow for follow-up, creating an Entry Line that establishes likeability and interest within 45 seconds, and the importance of charting during a conversation.

Champion's Corner

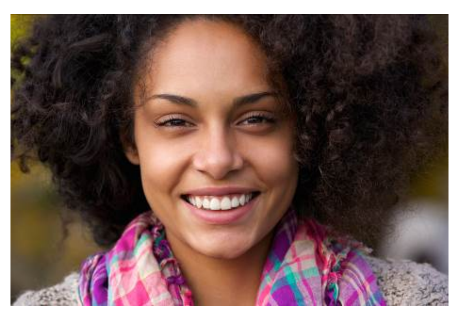
These sessions are appropriate for those who train others within the organization.

Webinar: How to Make Your Clients/Members Smile

30-Minute Session

June 19

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

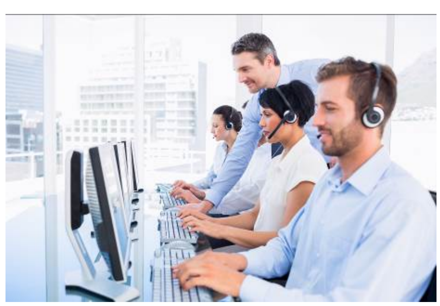
All PRN members are invited to this session to learn more about Cohen Brown's Call Center Series training programs. *Leading the Call Center Relationship Management Labs* helps managers understand the importance of training their direct reports as a means of achieving success in their call centers, and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

Before You Pick Up the Telephone or Walk Out the Door

June 28

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 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 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	3
❑ Turning Reactive Requests into Proactive Opportunities	Apr	5
❑ Motivation Through Reward and Recognition	Apr	17
❑ Preparing for Teleconsulting Calls During Campaigns	May	1
❑ Distance Management	May	3
❑ Scripting for Primed Referrals	May	8
❑ ***Updated!*** Creating and Inspecting Plans	May	10
❑ Taking It to the Next Level	May	15
❑ Dealing with Difficult Employees	May	17
❑ Coaching Behaviors That Will Improve Results	May	22
❑ Digging Deep into Probing Questions	May	24
❑ Conducting Scriptwriting Clinics	May	31
❑ ***New!*** If They Say, Then I Say	June	5
❑ Tellers Drive to the Bottom Line	June	7
❑ Honesty in Coaching	June	12
❑ Commitment to Follow-Up	June	14

❑ ***Webinar:*** How to Make Your Clients/Members Smile (30 Minutes)	June	19
❑ ***B2B:*** Before You Pick Up the Telephone or Walk Out the Door	June	28
❑ 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.