

Cohen Brown Performance Results Network 2018 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 and Arizona Time
- 1:30 PM – 2:30 PM Mountain Time
- 2:30 PM – 3:30 PM Central Time
- 3:30 PM – 4:30 PM Eastern Time

Retail Front-Line Process Core

Process Reinforcement for
Managers



Setting Attitude Goals July 10

People talk about attitudes. You've had motivational speakers at your company, and what happens after they leave? Nothing! They told you to be more passionate. But you feel you are passionate and you don't know what else to do.

We will discuss how attitudes can make you more money, help create success, and extend the length of your life.



No Complaining Zone 45-Minute Session

July 17

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.



Coaching Your Team to Success

July 24

During this session we will talk about making a pact to take control of your day so you can

focus on those behaviors that are most important to the success of your team. Once you make the commitment to take control of your day, you will use the Coach Skills Loop to create a world-standard coaching experience for your team.



Conducting Effective Meetings

August 23

This session will focus on developing effective meetings that will achieve the best results for your team. During the session, we will focus on the steps of meetings and why each of these steps is important to ensure clarity, capability, and motivation in your team.





It's a Marathon, Not a Sprint!

September 6

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.



NEW! Up, Up, and Away

September 20

The Lawnchair Motivation ModelSM was inspired by a true story about an individual in Southern California who hooked 45 helium weather balloons to a regular lawn chair. His goal was to lift the lawn chair 30 feet into the air. Though it wasn't his intention, he rose to 16,000 feet—into the path of commercial airliners.

We will discuss how filling certain "balloons" gives our teams a lift. At the same time, we have to pay attention to sandbags that may drag them down. As managers, we need to fill balloons and empty sandbags to create successful teams.

Process Reinforcement of Needs Met

Why Conduct Business With Us?

July 19

Creating a great Differentiation Statement can set you apart from your competition. An ordinary professional will sell price first, but you should go beyond price. What words will convince a prospect that you are the World-Standard organization with whom they should do business?

Tag, You're It!

July 25

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.



Working as One

July 26

The fact is, 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. This session will focus on overcoming these obstacles.

Client/Member Retention

August 14

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.



A Loan, Anyone?

August 21

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-FiNAPSM has been gathered in the Day-to-Day Banking and Deposits/Investments Categories.



The Core of the Mini-FiNAP

September 5

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

September 11

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

September 18

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 25

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.

Champion's Corner

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

Behavioral Campaigns

30-minute session

August 28

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

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.

Mini-FiNAP Certification

30-minute session

September 13

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



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 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 Needs Met

Determining Your Market September 27

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

August 22

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:

<input type="checkbox"/> Setting Attitude Goals	July	10
<input type="checkbox"/> No Complaining Zone (45 minutes)	July	17
<input type="checkbox"/> Why Conduct Business With Us	July	19
<input type="checkbox"/> Coaching Your Team to Success	July	24
<input type="checkbox"/> <i>Webinar:</i> Tag, You're It!	July	25
<input type="checkbox"/> Working as One	July	26
<input type="checkbox"/> Client/Member Retention	Aug	14
<input type="checkbox"/> A Loan, Anyone?	Aug	21
<input type="checkbox"/> So You Say? <i>For Those in Service</i>	Aug	22
<input type="checkbox"/> Conducting Effective Meetings	Aug	23
<input type="checkbox"/> Behavioral Campaigns (30 minutes)	Aug	28
<input type="checkbox"/> The Core of the Mini-FINAP	Sept	5
<input type="checkbox"/> It's a Marathon, Not a Sprint!	Sept	6
<input type="checkbox"/> It Begins and Ends with the Mini-FINAP	Sept	11
<input type="checkbox"/> Circles of Five (30 minutes)	Sept	12
<input type="checkbox"/> Mini-FINAP Certification (30 minutes)	Sept	13
<input type="checkbox"/> The Royal Road to the Close	Sept	18

<input type="checkbox"/> <i>New!</i> Up, Up, and Away!	Sept	20
<input type="checkbox"/> In-Person Networking	Sept	25
<input type="checkbox"/> Determining Your Market <i>For Those in B2B Banking</i>	Sept	27
<input type="checkbox"/> Call Center Process Overview	By Appointment	
<input type="checkbox"/> Leading Call Center Facilitator Session	By Appointment	
<input type="checkbox"/> Call Center Relationship Management Lab I Facilitator Session	By Appointment	
<input type="checkbox"/> Call Center Relationship Management Lab II Facilitator Session	By Appointment	
<input type="checkbox"/> Business Banking Process Overview	By Appointment	
<input type="checkbox"/> Breakthrough B2B Banking Facilitator Session	By Appointment	
<input type="checkbox"/> Breakthrough Service Process Overview	By Appointment	
<input type="checkbox"/> Leading Breakthrough Service Performance Facilitator Session	By Appointment	
<input type="checkbox"/> Breakthrough Service Performance Facilitator Session	By Appointment	

If you have any questions or comments, please contact Cindy Griffith at (330) 879-5474 or cynthia_griffith@cbmg.com

Please register online.

Thank you.

