Cohen Brown Performance Results Network
2018 Fourth 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)

October 1–November 3	November 4–December 31
8:30 AM – 9:30 AM Pacific/Arizona Time	8:30 AM – 9:30 AM Pacific Standard Time
9:30 AM – 10:30 AM Mountain Time	9:30 AM – 10:30 AM Mountain/Arizona Standard Time
10:30 AM – 11:30 AM Central Time	10:30 AM – 11:30 AM Central Standard Time
11:30 AM – 12:30 PM Eastern Time	11:30 AM – 12:30 PM Eastern Standard Time

Retail Sales Process Core

Process Reinforcement for Sales Leadership

Positive Communication for Managers

30-Minute Session

October 2

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.

Creating and Inspecting Plans

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

October 10

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.

Honest Conversations

October 24

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.

Maximizing Your Coaching

October 30

You wake up in the morning, make coffee, get the paper, pour the coffee, read the sports page, and head to the shower. This is your routine. Routines allow us to be consistent and efficient, while becoming the best of the best. The same applies to our daily and weekly coaching skills, which we will discuss during this session. Perfecting your weekly meetings, huddles, debriefs, and scriptwriting will be our focused topics.

Positive Presence

November 7

You have found yourself in the middle of a merger, a restructure, or 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 merger has on you as an individual, 2) The impact it has on your employees and how you deal with that, and 3) The impact it has on your clients/members.

Time Management

Your Most Valuable Resources: Time and People

November 20

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, and your people's 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.

Conducting a Hidden Clues Clinic

November 29

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 as how to script a related Tag-on and a benefit statement to use during a banker conversation.

Coaching Behaviors That Will Improve Results

December 6

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.

New! Getting Granular with Your Big Five Topics

December 11

Details matter. Think about a friend telling you about a bouquet of flowers a bride carried at a recent wedding. "It was a very pretty bouquet" doesn't tell you much. But details allow you to visualize: "It was a breathtaking bouquet full of blooming blossoms in bold colors of orange, yellow, and purple sprinkled with soft and lacy Baby's Breath."

During this session, we will look at coaching topics that would produce weak outcomes and discuss how to strengthen the topics.

Creating a Vision Statement

30-Minute Session

December 13

The end of the year is a time for reflection and identifying what we will improve for the upcoming year. In this session, participants will create a focused 2019 personal vision statement, along with an action plan to make their vision a reality.

Leadership That Builds Successful Teams

45-Minute Session

December 19

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.

Process Reinforcement of Selling Skills

Commitment to Follow-Up

October 17

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

Don't Forget About Investments

October 23

As you review your profiles looking for missed opportunities, you might notice the investments category is often ignored, or the amount of information gathered is minimal. We will review how to transition from any category to investments as well as discuss the most important probing questions to uncover clients'/members' or prospects' investment needs.

Meet and Greet

October 25

Your lobby is always full of clients/members, in other words, opportunities. Since opening their accounts, your opportunity to talk to these clients/members has normally been very limited. As you meet and greet, you will find potential opportunities. This session will discuss methods for approaching clients/members and prospects and the hidden clues to look for when greeting them in your lobby.

Webinar: Handling the Rate Shopper

November 28

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 a current or future sale.

Digging Deep into Probing Questions

December 4

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.

Improving Your Teleconsulting

December 12

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.

Why Conduct Business with Us?

December 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.

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 objections from all clients/members to increase their close ratios and shorten the sales cycle.

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

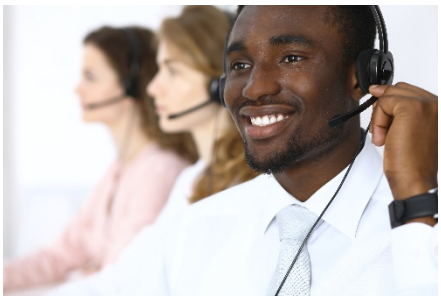
Part I of the Call Center Relationship Management Lab focuses on developing a consultative approach to treating callers, and lays the groundwork for service professionals continuing on to sales responsibilities. This session will identify the key messages and workshops in each module and provide facilitators with step-by-step instructions to successfully deliver the training to 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 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 sales 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 sales 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 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

Rural Banking

November 8

Using several case studies and the Mini-FiNAP process, participants will work on skills to obtain an overview of the entire business, as well as discover information regarding the business structure and financial services the rural client is currently utilizing.

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 sales 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.

Process Reinforcement of Selling Skills

Service Meetings

October 16

The objective of a service meeting is to change service behavior in a positive direction. The keys to a great service meeting are leadership, direction, focus, and group participation. We will discuss the steps that allow you to deliver the best-of-the-best, World-Standard Service Meetings.

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

❑ Positive Communication for Managers **(30-Minute Session)**	Oct	2
❑ Creating and Inspecting Plans	Oct	10
❑ Service Meetings	Oct	16
❑ Commitment to Follow-Up	Oct	17
❑ Don't Forget About Investments	Oct	23
❑ Honest Conversations	Oct	24
❑ Meet and Greet	Oct	25
❑ Maximizing Your Coaching	Oct	30
❑ Positive Presence	Nov	7
❑ Rural Banking	Nov	8
❑ Time Management	Nov	20
❑ ***Webinar:*** Handling the Rate Shopper	Nov	28
❑ Conducting a Hidden Clues Clinic	Nov	29
❑ Digging Deep into Probing Questions	Dec	4
❑ Coaching Behaviors That Will Improve Results	Dec	6
❑ ***New!*** Getting Granular with Your Big Five Topics	Dec	11
❑ Improving Your Teleconsulting	Dec	12

❑ Creating a Vision Statement **(30-Minute Session)**	Dec	13
❑ Leadership That Builds Successful Teams **(45-Minute Session)**	Dec	19
❑ Why Conduct Business with Us?	Dec	20
❑ 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.

If you have any questions or comments, please call 330-879-5474.

To register for 4th Quarter sessions, click on the REGISTER NOW link beside the individual sessions listed in the 2018 Fourth Quarter Calendar of Events Registration email. You may contact Cindy Griffith at 330-879-5474 for sessions listed as By Appointment.

Thank you.