Cohen Brown Performance Results Network
2019 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 Process Core

Process Reinforcement for Leadership

Conducting Effective Meetings

April 9

This session will focus on developing the five most effective meeting topics that you can present to your team. During the session, participants will be able to benefit from each other's experience to create lists of topics that will impact their teams and their teams' focus, while considering market conditions.

Leadership That Builds Successful Teams

45-Minute Session

April 11

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.

I THINK They See Me?

April 17

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.

Positive Presence

April 24

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 change 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.

Creating and Inspecting Action Plans

May 1

"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.

Performance Coaching

May 9

Coaching employees is key to building their confidence levels, and increasing their skill sets and sales results. This session focuses on providing managers with a qualitative coaching process that will assure quantitative results for their employees.

Distance Management

May 16

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 solution to time management. This session will provide participants with a clear understanding of how to implement Distance Management for techniques such as coaching, rounds, briefings/debriefings, skill enhancement, and meetings.

Honesty in Coaching

June 6

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.

Working at Home: Tips for Your Team and Keeping Engagement Fun

June 20

Your team finally has the opportunity to work from home, so what are some tips to keep them focused, organized, and engaged? And, as a coach, how do you keep the engagement fun?

Process Reinforcement of Selling Skills

Focusing on the Retirement Quadrant

April 4

Research shows that the bank or credit union with which a client/member deposits their retirement investments is where they will deposit the majority of their funds including checking and other types of savings. This session will focus on investment probing questions and transition lines to other financial categories.

Webinar: Handling the Rate Shopper

April 16

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.

Taking It to the Next Level

April 30

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 sales success by learning advanced skills and techniques for creating an interest with clients/members and prospects.

If They Say, Then I Say

May 7

Remember passbooks, coin saver pig folders, getting a little pack of Life Savers, or the kids table with comic books? It is not that simple anymore. During this session, we will discuss the behaviors and actions that will allow future generations to have fond memories of their financial institutions.

Scripting for Primed Referrals

May 21

This session will allow you to script what you want your referral sources to say when making referrals to you and other professionals within your organization. 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.

Digging Deep into Probing Questions

May 23

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.

Finer Points of Transition Lines

June 4

Transition lines allow you to make smooth segues from category to category using a benefit you may have heard during a conversational clue. There are times you will transition using a special product or service your organization is offering. Either way, transition lines allow you to begin a deeper conversation into the current and future needs of your client, member, or prospect.

Improving Your Teleconsulting

June 11

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.

Facilitator's Corner

This session is appropriate for those who train others within the organization.

Webinar: How to Make Your Clients/Members Smile

30-Minute Session

April 25

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 your branch and business-line staff by 500%. Participate in this webinar to identify management gaps and opportunities to modify existing behaviors within your teller team.

Extraordinary Leadership One-Day Refresher

30-Minute Session

May 29

We will discuss this one-day session which will outline the core modules in Extraordinary Leadership (EL). This can be used as a refresher or for those new to the Process.

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. 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 and shorten the sales cycle.

Pre-Requisite: Ownership of Call Center Process curriculum

Facilitator Session

Call Center Relationship Management Lab, Part I

By Appointment

Modules 1 through 8

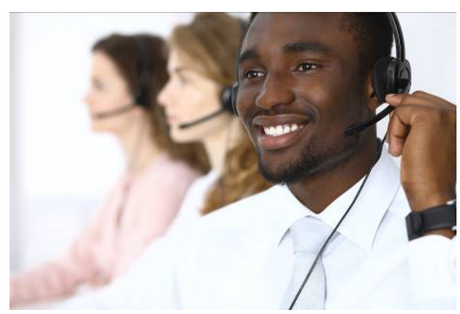
Part I of the Call Center Relationship Management Lab focuses on developing a consultative approach to treating callers, and lays the groundwork for service professionals continuing on to sales responsibilities. This session will identify the key messages and workshops in each module and provide facilitators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

Small Business Pre-Call Planning

May 15

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

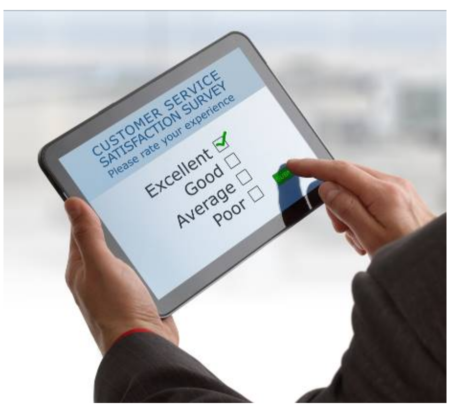
This session is designed to provide maximum comfort for facilitators of *Breakthrough B2B Banking*. Facilitators will review all necessary components, including how to prepare to facilitate a successful class, the key messages to deliver, and workshop tips. There will be ample time to cover any questions 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 leaders) 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) 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.

Facilitator Sessions

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

❑ Focusing on the Retirement Quadrant	Apr	4
❑ Conducting Effective Meetings	Apr	9
❑ Leadership That Builds Successful Teams (45 Minutes)	Apr	11
❑ Webinar: Handling the Rate Shopper	Apr	16
❑ I THINK They See Me?	Apr	17
❑ Positive Presence	Apr	24
❑ Webinar: How to Make Your Clients/Members Smile (30 Minutes)	Apr	25
❑ Taking It to the Next Level	Apr	30
❑ Creating and Inspecting Action Plans	May	1
❑ If They Say, Then I Say	May	7
❑ Performance Coaching	May	9
❑ Small Business Pre-Call Planning	May	15
❑ Distance Management	May	16
❑ Scripting for Primed Referrals	May	21
❑ Digging Deep into Probing Questions	May	23

❑ EL One-Day Refresher (30 Minutes)	May	29
❑ Finer Points of Transition Lines	June	4
❑ Honesty In Coaching	June	6
❑ Improving Your Teleconsulting	June	11
❑ Working at Home: Tips for Your Team and Coaching Your Team	June	20
❑ Business Banking Process Overview	By Appt	
❑ Breakthrough B2B Banking Facilitator Session	By Appt	
❑ Breakthrough Service Process Overview	By Appt	
❑ Breakthrough Service Performance Facilitator Session	By Appt	
❑ Call Center Process Overview	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 any time 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 2019 Second Quarter Calendar of Events Registration email. You may contact Cynthia Griffith at 330-879-5474 for sessions listed as By Appointment.

Thank you.