Cohen Brown Performance Results Network
2019 Third Quarter Calendar of Events

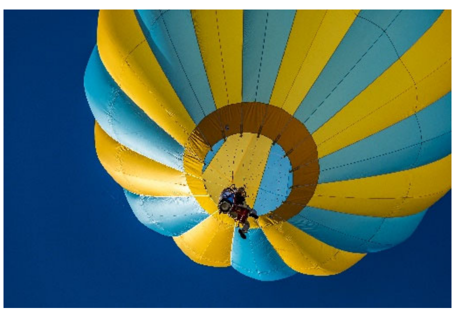
PLEASE NOTE: All sessions will occur according to the schedule below, unless designated as a Facilitator Session or specifically noted by times listed below the description.

Times of All One-Hour Sessions: (Unless otherwise noted)

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 Sales Process Core

Process Reinforcement for Sales Managers



Up, Up, and Away

July 9

The Lawnchair Motivation Model℠ 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.

Coaching Opportunities

July 16

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 23

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.

Setting Attitude Goals

August 6

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.

Coaching Your Team to Success

September 10

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.

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 Needs Assessment. This session will focus on clues and Windows of Opportunities that will allow you to transition with ease to the Day-to-Day Banking category from each of the other three categories.

Client/Member Retention

August 8

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! Getting the Most From Deposit Campaigns

August 13

We will walk through each step of a Power Triad - Big Fives, Scriptwriting, and Objections – to ensure you are able to get the most from your deposit campaigns. In addition to these steps, creation of strong Tag-ons will be reviewed.

The Core of the Needs Assessment

September 12

Uncovering the known and unknown needs, and the current and future needs of your clients/members/prospects is the core of the Needs Assessment. 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 Needs Assessment.

It Begins and Ends with the Needs Assessment

September 17

How do you start the Needs Assessment? 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 19

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 24

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 26

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.

Needs Assessment Certification

30-minute session

August 15

The Needs Assessment 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 Needs Assessment. The certification process ensures that a sales employee can perform an effective Needs Assessment with a client/member or prospect, leaving them with the perception of being served, while substantially increasing sales opportunities.

Behavioral Campaigns

30-minute session

August 20

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

August 27

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 Needs Assessment. 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

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

Centers of Influence

August 22

What do Centers of Influence want from Business Bankers?
Is it:

- Communication by e-mail or telephone?
- Someone who is bilingual?
- Availability?
- Closing the deal on time?
- Honesty?
- Referrals back to the business person?
- Control of the situation (or the perception of control)?
- No surprises – great follow-up?
- Competitive pricing?
- Knowledge – awareness of products, regulation?

Let's discuss.

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.

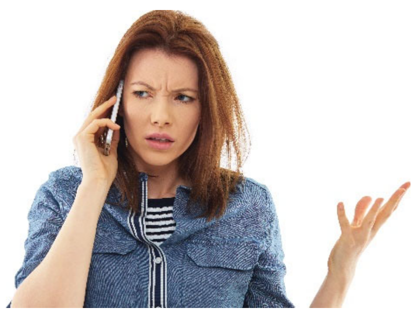
Pre-Requisite: Ownership of Breakthrough Service Process Curriculum

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.

Process Reinforcement of Service Skills



So You Say?

For Those in Service

45-minute session

August 29

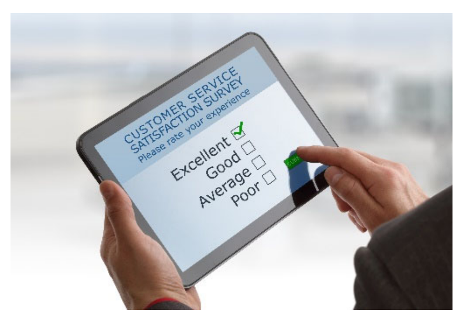
This session recognizes what those in support service should and should not say when speaking with others. This session will contain scriptwriting clinics.

Facilitator Sessions

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:

❑ Up, Up and Away	July	9
❑ Creating a Differentiation Statement That Goes Beyond Price	July	11
❑ Coaching Opportunities	July	16
❑ Working as One	July	18
❑ No Complaining Zone (45 minutes)	July	23
❑ Transition Lines to Day-to-Day Banking	July	25
❑ Setting Attitude Goals	Aug	6
❑ Client/Member Retention	Aug	8
❑ *NEW!* Getting the Most From Deposit Campaigns	Aug	13
❑ Needs Assessment Certification (30 minutes)	Aug	15
❑ Behavioral Campaigns (30 minutes)	Aug	20
❑ B2B Banking: Centers of Influence	Aug	22
❑ Circles of Five (30 minutes)	Aug	27
❑ So You Say? *For Those in Service* (45 minutes)	Aug	29

❑ Coaching Your Team to Success	Sept	10
❑ The Core of the Needs Assessment	Sept	12
❑ It Begins and Ends with the Needs Assessment	Sept	17
❑ The Royal Road to the Close	Sept	19
❑ In-Person Networking	Sept	24
❑ *Webinar:* Tag, You're It!	Sept	26
❑ Call Center Process Overview	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	
❑ 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.