

# Cohen Brown Performance Results Network 2019 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 2

8:30 AM – 9:30 AM Pacific/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

## November 3–December 31

8:30 AM – 9:30 AM Pacific Standard Time  
9:30 AM – 10:30 AM Mountain/Arizona Standard Time  
10:30 AM – 11:30 AM Central Standard Time  
11:30 AM – 12:30 PM Eastern Standard Time

### Process Reinforcement for Sales Leadership

## Creating a Vision Statement

30-Minute Session

**October 16**

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 2020 personal vision statement, along with an action plan to make their vision a reality.



## Positive Presence

**November 6**

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.



## Coaching Behaviors That Will Improve Results

**December 11**

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.

**Process Reinforcement of  
Selling Skills**



## Commitment to Follow-Up

**October 24**

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.



## Tellers Drive to the Bottom Line

**November 14**

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 appropriate specialized sales personnel. How to create the awareness will be the focus of this session.



## Don't Forget About Investments

**December 19**

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.

# Sessions At-A-Glance

<input type="checkbox"/> Creating a Vision Statement (30-Minutes)	Oct	16
<input type="checkbox"/> Commitment to Follow-Up	Oct	24
<input type="checkbox"/> Positive Presence	Nov	6

<input type="checkbox"/> Tellers Drive to the Bottom Line	Nov	14
<input type="checkbox"/> Coaching Behaviors That Will Improve Results	Dec	11
<input type="checkbox"/> Don't Forget About Investments	Dec	19

*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 4th Quarter sessions, click on the REGISTER NOW link beside the individual sessions listed in the 2019 Fourth Quarter Calendar of Events Registration email.*

*Thank you.*

