

The Member Financial Review

FRONT-LINE SOLUTIONS

The Member Financial Review (Member Review) performance solution builds representatives' capability and confidence to discover and help customers with their current and future needs, thereby enabling the organization to deliver a positively differentiated customer experience, increased customer and employee satisfaction, and increased revenue.

The Member Review leverages Cohen Brown's revolutionary and highly effective learning and embedding methodology called ProPracticeSM and is composed of three elements:

1. **Member Financial Review Workshop and ProPractice Modules:** To build representative capability, confidence, and success in conducting Member Reviews. This workshop for representatives and their managers includes the use of ProPractice, audio-visual messages, numerous interactive skill-building exercises, and implementation action planning to ensure representatives and managers are prepared to implement the Member Financial Review.

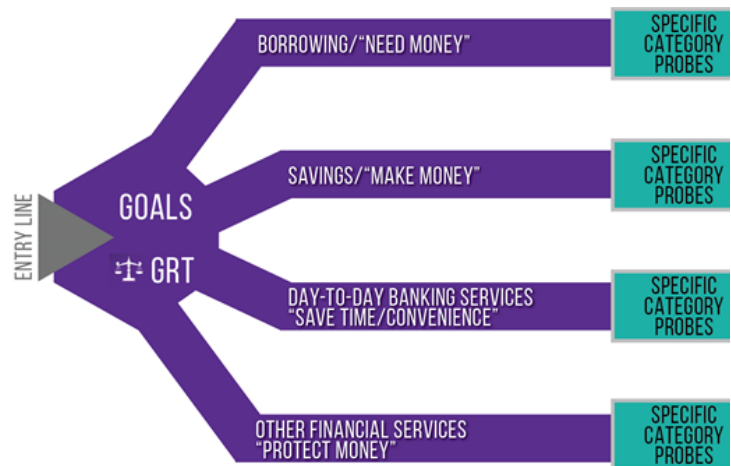
Specific ProPractice modules address:

Module 1: Member Review Entry Lines

Introduces the standard Entry Line and the Entry Line for use with existing customers.

Module 2: Member Review Member Goals – Other Financial Services

Teaches the Member Review Categories: Borrowing, Savings, Day-to-Day Banking Services, and Other Financial Services, and the critical few key questions to uncover the member needs, both current and future, known and unknown. It also teaches the best and empirically proven way to ask these questions so that members perceive the benefits to them of responding, and also understand that the representative cares about and truly wants to help them.



Module 3: Member Review Summary – Great Goodbye

Teaches the Summary, Presenting Recommendations, Next Steps, Obtaining Member Contact Information, the Offer to Assist, and the Great Goodbye.

Module 4: Overcoming Objections – Member Review

Builds the success of representatives in overcoming the most common objections they may hear or are concerned about hearing when seeking to conduct Member Reviews.



2. **Manager Workshop:** Teaches the Proven Best Practices for Leading, Managing, and Coaching the Member Review.

Even the best processes in the world must be managed to ensure they are properly utilized to achieve desired outcomes. Without leadership, management, and coaching, it is impossible to maximize results. This additional workshop for managers and their supervisors includes the use of ProPractice, video excerpts from Cohen Brown's *Professional Sports Coaching for Business* program, an audio-visual message from Martin L. Cohen, M.D., numerous interactive skill-building exercises, and implementation action planning to ensure managers are prepared to lead, manage, and coach the Member Review.

3. **Continuous Consulting:** Cohen Brown prepares the organization for the successful implementation of the Member Review and supports success throughout the life of the engagement.

Structure:

The Member Financial Review solution is a flexible and holistic training, practice, and coaching process specifically developed for the staffing and time constraints many organizations face. It leverages Cohen Brown's **cbway**® to enable quick and convenient delivery of exactly the right skills development content, when, where, and how it is needed.

Initial training and subsequent refresher/reinforcement sessions may be delivered virtually or in person, with groups or individual representatives, anytime and anywhere. Cohen Brown will work with the organization to determine the implementation approach that will work best for them.

In addition to ProPractice modules, The Member Financial Review solution includes video-based teaching messages and numerous interactive skill-building exercises covering all aspects of the Member Review. A comprehensive Leader's Guide and Participant Workbook are also included.

After attending training, representatives and managers continue to use ProPractice to achieve and sustain mastery of the Member Financial Review. Managers apply the Proven Best Practices for leading, managing, and coaching representatives, and results and experiences with the Member Review are debriefed regularly to support accountability for implementation, continuous improvement, and maximum results.

Participants:

For all branch personnel who interact with customers or prospective customers in a sales capacity and their managers, including managers above the branch level.

