COACH'S CORNER

August 2019 Edition #2

THE PSA OVERVIEW WEBINAR ON JULY 10TH – SPREADING THE SPIRIT OF PSA WITHIN YOUR ORGANIZATION!

We were delighted to host a webinar on July 10th to Executive Operators, Branch Managers and other key representatives within your organization to give them a high level overview of the spirit and intention of the PSA. Don't be surprised if you start to see a positive ripple effect and people referencing client classification, client experience, introduction kits, and the concept of fit! The more people in your organization who are aware of this approach to working with clients, the better supported you will be! Be sure to answer any questions they might have about the PSA enthusiastically :)

The latest group of PSA Trainees from Christian Credit Union has enjoyed some time off from the program in July and has started a round of one-on-one coaching calls. They will be set to resume the last part of PSA Training in September. You are almost there folks – hang in there :)

We are also looking forward to launching the first live training of PSA for the MFIS Division in early 2020, which we are very excited about. Stay tuned for more information here…

ACE REBRANDING UPDATES

I want to thank everyone who has turned in their July 2019 updates already – it is greatly appreciated**. For those of you who haven't turned in your July updates, please do so as soon as possible.** I will be providing a mid-August report to all CUSO Partners as well as, preparing a tally for the September edition of Coaches Corner so you can see how much progress we've made as an organization.

IMPORTANT: Also, in August we will be reconciling the list of those with PFOs delivered based on the ACE Rebranding Updates by going into Maximizer and running lists of "A" level clients to see who has information filled in related to the PFO – whether it was delivered, when it was delivered, etc. We will also be looking to see if the Financial Plan has been uploaded to the client file in Maximizer. If you haven't translated the information from your Excel tracker to Maximizer, I encourage you to do this in the next week as this review be initiated **August 14th.**

QUESTIONS FROM THE FIELD

"How do I order more PFO Binders and how many do I need to order?"

This is such an important question in light of the major initiative throughout CUSO to rebrand with all of your "A" level clients as well as, properly onboard any new "A" level clients. All PFO binders ordered go directly through Danielle and the minimum order has recently been changed from 25 to 10 as per the PFO Binder Order Form attached above. Please note, these binders and materials often need to be ordered and assembled so you should allow about 4 weeks for delivery, which means you need to be proactive about managing your PFO Binder Inventory.

I would be remiss if I didn't mention the sweet, sweet service you have access to with CUSO because all of the other advisors I work with are left to their own devices to source, order, and assemble their PFO binders – you folks are so lucky!!!

THANKSGIVING – *Right around the corner!*

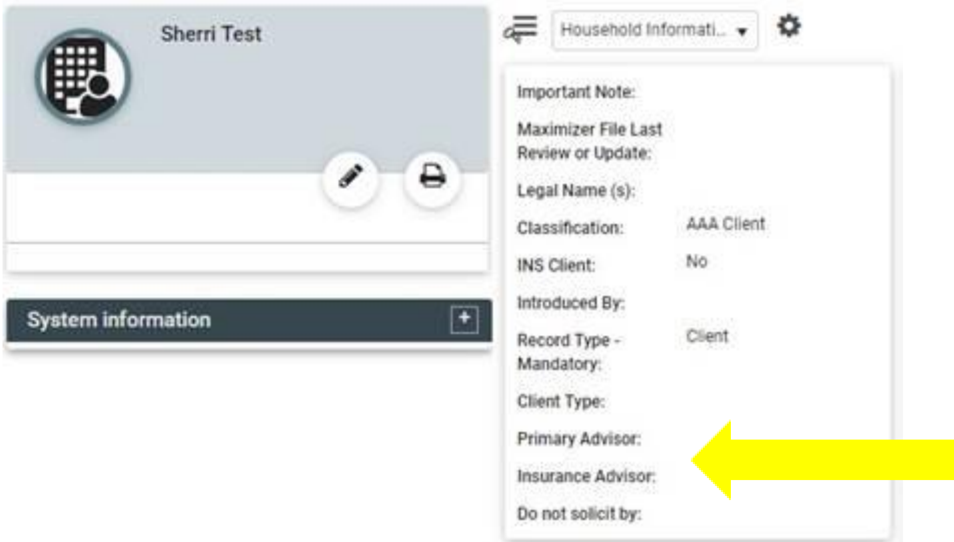
Well summer is officially half over already and most of us are in disbelief – it has gone by exceptionally quick this year for so many! Before you know it, we will all be sitting around the dinner table at Thanksgiving feeling full and grateful. It's time to get an accurate count of your top clients and place your order for the beautiful Lavish Thanksgiving Cards through the CUSO Fulfillment Centre (aka Danielle). These cards will magically arrive in September and you'll have plenty of time to sign them – which is important! Remember to spend extra time and attention for the handwritten greetings to your AAA and AA clients – making the messaging memorable and meaningful (focus on their FORM information to have maximum impact). Before you know it, it will be time to address, stamp, and pop them in the mail! There are some beautiful stamps out there already – make your envelope special.

Ordering instructions for Thanksgiving Cards came out yesterday via email by Danielle, so if you haven't placed your order yet, please do so!

MAXIMIZER CRM

We've recently added a new field on Maximizer, which is designed to ensure we are taking care of our client's insurance needs – which is ultimately protecting their family security and very, very important. In the DETAILS Tab for each household, in addition to Primary Advisor, which is designed to identify who the Financial Planner is for wealth management, there is another field for Insurance Advisor. This is a great way to identify if an Insurance Review/Planning/Solutions have been worked on. If it is blank – it's time to ask those questions and offer an Insurance Review. For those of you who are insurance licensed, if an insurance solution is implemented with you – you would put your name in this field as well.

If you coordinate your insurance through another individual within the organization, their name would be added here. If they already having something in place elsewhere, let's add the name of that Insurance Advisor. This approach will allow us to keep our eye on where meaningful insurance opportunities exist for our clients.



As always, we continue to welcome your feedback regarding how to make this one of the most awesome CRM Dashboards we could ever hope for!!!

Enjoy the last few lazy days of summer in **AUGUST** everyone!