



April 2021 Edition #22

PSA TRAINING UPDATES

We want to wish each of the **MFIS PSA Group 2 Participants** a big **CONGRATULATIONS** for completing the PSA program as of yesterday – Woohoo! In April we will be initiating the PSA Certification.

Kootenay Savings Credit Union (KSCU) PSA Training - This KSCU Group is launching into **Pillar 3: Client Onboarding** in April. Of course, it was terrific to have one-on-one calls in March with the teams to meet each of them and learn more about their 'story' and 'vision' for the advisory business.

Revelstoke Credit Union (RCU) PSA Training – We are very excited to initiate the PSA Program next week with our newest partner RCU! We also welcome them to the first edition of the Coaches Corner.

How the Dedicated “DOWN” Day Can Help Make Things Look “UP”

This is a powerful time allocation tip I recommend you consider integrating with your time management plan – it simply involves setting aside some professional “Down” time. This is a day where there is nothing scheduled in terms of client meetings, branch meeting, conference calls, coaching or other regularly occurring commitments. Instead, it is a “Down” day where you are free from distraction to really get DOWN to business. This allows you to spend the day:



- Doing some serious clean up on all the to-dos and requests that may have snow-balled on your Tasklist;
- Devoting uninterrupted time to important projects & tasks that require mental concentration to complete properly and efficiently;
- Cleaning up your Outlook, Maximizer or Client files so you can find things when you need them; or
- Committing time to your ongoing Professional Growth (courses, designations & CE credits).

Recently, one of the teams from KSCU shared with me that they devote the **first Tuesday of every month** for exactly this purpose. I have another team outside of CUSO who devotes one solid week each quarter to clean up all the things need to be tidied up. Find a way to build some professional “Down” time into your calendar – start small if you have to, but give it a try! We all know how AWESOME to click these off as complete and watch the list shrink!

ACE MID-YEAR FOLLOW UP

I hope everyone is continuing to make significant progress delivering the exceptional client experience and reaping the rewards of their hard work.

I will be **reaching out to individual teams in June** to see how things are going as well as, celebrating the progress they are making towards rebranding and delivering the planning and PFO Binders to your top clients. Please be sure to indicate these updates on Maximizer along with uploading the Financial Plans so we can acknowledge your hard work!

For those of you finished rebranding, focus on anchoring your review meetings back to the PFO and keeping it up-to-date and meaningful for your top clients.

WOW YOUR STRATEGIC PARTNERS – WITH PIZZA!

For those of you with Strategic Partners who are **CPAs and Accountants**, a great way to stay top of mind and fortify trust is to do something thoughtful for them during a particularly stressful time of the year – yes Tax Time! I have a team who every year on the last day of taxes has lunch sent to their Strategic Partner accountant because they KNOW nobody has time to step away from their desk! Another option is to send them something the day after the tax deadline to enjoy and you can congratulate them on making it through another Tax Season.

Either way – it will be greatly appreciated by the CPA and the advisory team feels good doing it.



ADVANCED COACHING SESSIONS

The next Advanced Coaching Session is set for **Wednesday, April 7th at 12:30** and features **Hugh Culver's** with his session on **"Building Resilience in a Post-Pandemic Market"**.

Hugh always inspires and more importantly he is able to offer us simple ideas to implement that can make a big difference in our work and personal lives.

There are also a couple of other important Sessions to be aware of including **Responsible Investing** and of course, **The BERT Conference** in mid-April.

We encourage you to tune-in for an inspiring spring re-boot!

P.S. I'm not sure how many of you were able to attend the **Women's Symposium** I co-hosted on March 25th, but if you would like a link to the recording please let me know and I'll be happy to send it along :)



QUESTIONS FROM THE FIELD

“How often should we be updating our Introduction Kit and Website information?”

We recommend you carefully review your Introduction Kit & Website at the same time once a year to ensure it is accurate and up-to-date. Several things could change over that time and should be updated:

- Your Number of Years of Experience
- Your Titles & Designations
- Individual Team Members
- Your Community Involvement
- Family Updates
- Photos – We can’t use the same one forever!

Of course, if something significant changes during the course of the year we recommend you update it at that time and not wait for the ‘annual update’. Experience tells us that this doesn’t always happen due to the many things we are trying to prioritize and accomplish. I recommend you set an annual reminder on your calendar at the time of year that makes most sense for you to review and update it.



MAXIMIZER KEY CONTACT

I’m delighted to let you know that **Ann Wong** will be the CUSO Maximizer Key Contact going forward! Ann will initiate all New-User Set Up, direct you to training as required, and assist with the continued customization and integration of Maximizer within CUSO. If you have any questions about Maximizer, please feel free to reach out to Ann and she will be more than happy to assist!

YOUR VIEW

If you haven’t taken time to yet to set up your preferred ‘view’ on the main Household Screen in the Contact Record, I recommend you do. There are many, many tabs listed across the screen and some I’m sure you don’t use. You can simply ‘unsee’ them to remove them from your Dashboard to simplify your view. You can also re-order the sequence of the tabs so that the ones you use the most are on the left-hand side for easy access! Make Maximizer something you LOVE using :) If you have any Maximizer Tips or Tricks you’d like to share, please send them to me so I can pass them along.

HAVE AN AMAZING APRIL!

Success is nothing more than a few simple disciplines practiced every day.

~Jim Rohn