December 2019 Edition #6

DO YOU HAVE 20/20 VISION?

In a short few weeks, the calendar will be turning over and not only will it be a brand new year, but a brand new **DECADE**! WOW, it's like we are all starting a whole new chapter – **very exciting**!

We were delighted to bring you the Group Coaching Call on **Set Your Goals** in **November** which helped you get a jump start on reflecting on 2019 and thinking about what matters most to you personally and professionally as we forge ahead into 2020. We encourage you to take the time to map out the things you'd really like to achieve next year – write those goals down and think BIG! You know what they say, if you think you can – *you can* AND if you think you can't – *you can't*!

Use the **Set Your Goals Worksheet** in the PSA Program or the **Plan Like A Pilot** tool (also found in our PSA program) from Hugh Culver to get you started! I've attached these above for your convenience :)

THE PSA UPDATE TO THE FIELD

PSA Certification is getting underway for the latest group of participants, most of whom are Advisory Teams from Christian Credit Union, along with Assistants newer to some of the other CUSO Partners.

The inaugural run of **PSA Training for the newly created MFIS role** is starting in January 2020 – and we are very excited to begin working with this new group of trainees!

The **Annual Client Experience (ACE) Recognition** is now underway! Several Advisory teams have already had their calls with me and there are many, many more scheduled for mid-December. Since the December schedule of calls is more intense, please be sure all items required for submission are sent to me at least **two full days prior to our call** so I can be fully prepared. I will have all ACE Summaries completed and sent out to each Advisor on/by **December 31, 2019**. These will be summarized and provided to the various CUSO Executive Operators in January 2020.

ADVANCED COACHING 2020

We are delighted to let you know that Jay & I had the opportunity in November to provide a workshop to the Alberta Advisory Teams on how to grow your business by developing **Your Strategic Partners** – both internal and external partners! We hope to be bringing this to our BC Advisory Teams very soon as well. In

the meantime, we are going to create a Group Coaching Mini-Webinar Series on this important topic, so stay tuned for dates!

In **January 2020,** we will be hosting a Group Coaching call for all Advisory Teams on how to keep the **PFO Binder Relevant & Up To Date** so it becomes an ongoing anchor to your branding. This means as it gets bigger, thicker and heavier with every Review Meeting they bring it to, your high value clients have absolute clarity on the value you deliver. We can't let this be a one time event where they get the binder and we never talk about it again. The value of the rebranding comes from it's ongoing updating and use – yes, compounding it's usefulness, and you all know the value of compounding!

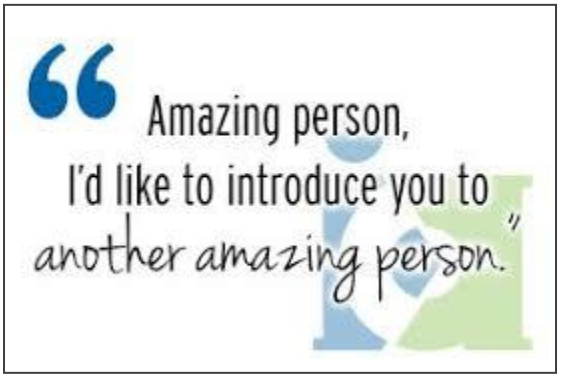
We are also planning to provide Group Coaching on **Client Appreciation Events** as well as, the **Introduction Process**. Stay tuned for more advanced coaching ideas in 2020 and we gladly welcome your suggestions!

QUESTIONS FROM THE FIELD

"We are confirming meetings, using Agendas and our Introduction Kit, but I am still not comfortable with the Introduction Process. Do you have any suggestions on how to make this more consistent when I'm meeting with my high value clients?"

Such a great and important question – I'm so glad you asked! I recently had a coaching call with a team of 5 Advisors who went through the comprehensive coaching program like you over 8 years ago! Yes, they still participate in coaching because they are constantly evolving to the changing environment and wanting to constantly sharpen their saw. This last call, they said to me – *We really want to focus 2020 on Growing Our Business*. I asked them to explain what they meant to me in more detail and they started talking about all kinds of complicated marketing plans, expensive marketing strategies, this and that, etc. I stopped them and told them they already had all the tools to grow their business and I wasn't sure why they were getting distracted by all of this 'other stuff'. I then asked the group this question: *"Who here has gone through the Introduction Process with a high value client in the last month?"* I honestly wasn't expecting any of them to respond, but much to my surprise one Advisor, Larry said: *"I have."* And so I asked him *"What happened Larry?"* and he said, "*Well Sherri, I got a referral."* So I paused and then I said to the other four Advisors: *"Does anybody have any other questions on how to grow your business?"*

Sometimes the simplest things get overlooked because of their simplicity – and this is one of them. The most impressive thing to me about this story, is that of the five Advisors Larry is the oldest – with over three decades of industry experience. And yet, here he is willing to make enhancements to his process because he knows it's the right thing to do – for his clients, for his team, and for his business. He's a great guy and an excellent advisor, but what makes this easy for him is that he actually believes in what he is saying to them – *if they are important to you, they are important to me and I will make the time to meet them.* There is no ask – this is never an ask!



Here's what I recommend you do in 2020 to make this a more consistent part of your meeting process with high value clients (who I might add, probably only see you once or twice a year so trust me when I say, this is *not* repetitive to them):

- Make sure the **Introduction Process is on the Agenda** – somewhere! Anywhere, so you are prompted to discuss it.
- Practice and **rehearse your scripting**, keep it short and sweet – record it on your smart phone and listen to it. Love what is awesome and fix what needs fixing.
- If you are conducting a meeting and a client is praising you and thanking you for how much you've helped them, know this: the **universe is begging you to share your Introduction Process** with them. And, it should go something like this: *Thank you Bob & Mary – I'm delighted you are so happy with the financial planning and recommendations we provided as it relates to your upcoming retirement – it's an exciting time for sure, with lots of important decisions to be made. If you know anyone else who is losing sleep over or simply unsure of what to do for their retirement, I'd be more than happy to speak with them – if they are important to you, they are important to me and I will make the time to meet with them. And, if what they are looking for isn't aligned with what I provide as a Financial Planner, I will do my very best to point them in the right direction.*
- **Be Zen.** We share the Introduction Process with our best clients because it's the **right thing to do.** Focus on doing what's right and the results will follow.

Like everything else in life, what separates the best from the rest really has nothing to do with *knowing* what to do, it's simply *doing* it. It takes discipline, but the rewards are tremendous.

I look forward to hearing about some amazing results from each of you in the New Year!

SERVICE EXTRAS – *Just Because!*

The **CUSO Core 4 of Servicing** consists of Review Meetings, Relationship Calls, Thanksgiving Acknowledgments and Moments of Truth. We do have advisory teams, however, who have wonderful client service traditions in addition to this including **Holiday Greetings** and/or Gifts and **Birthday Acknowledgements**.

If you are one of the teams who has a Holiday Greeting/Gift tradition, just a reminder that "tick-tock" we are into December already! Time to make sure your cards, envelopes, and gifts (if applicable) are getting organized and ready to go! If you are a team that does Birthday Cards, time to make sure you have enough cards ordered for next year because January 1 is just around the corner! Remember, we are all about sending cards that people just can't throw out because they are so beautiful :) If you are looking for a great card provider, please check out www.lavishcards.com.

Lastly, stay tuned in mid-December for some extra RSP and Tax client services that go over and above! We strive to be exceptional :)

MAXIMIZERCRM

This is a time of year where a main focus is on making sure your **clients are organized, classified and servicing commitments** are appropriately set on Maximizer for the year ahead.

Use this time to ensure all clients are coded accordingly and the appropriate Action Plan for their servicing is launched. You may have had clients who have been 'promoted' through increased engagement and we will want to reward these clients! The easiest way to manage this is to delete any outstanding Service Plan Activities triggered by the Action Plan. Next, launch the appropriate Action Plan paying attention to the start date which should ensure a seamless transition as it relates to their servicing (i.e. their Review Meetings, Relationship Calls, etc. are triggered at the same time of year as they are used to). We are pleased to let you know these Action Plans for Client Servicing were reviewed and enhanced this year.

Also, we have some exciting new Maximizer Training sessions coming up in 2020 including how to use the amazing **Opportunities Pipeline** feature! Stay tuned for training details and dates…

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!!!

I wish all of you a wonderful December to finish out 2019 and an amazing **Holiday Season** with your family & friends!

All the Very Best,