

The CUSO Core 4

Review Meetings

- A regularly scheduled, in-person client meeting.
- Review meetings are typically scheduled in 6-month or 12-month intervals.
- During the meeting, review financial and business matters, and reinforce key messaging.
- Holding review meetings with clients underscore the value you provide.



Relationship Calls

- A regularly scheduled, outbound call, used to check-in with a certain client in a consistent and proactive manner.
- Conversations are based on the Client Profile information.
- Relationship calls are typically scheduled in Quarterly, Semi-Annual, or Annual intervals.
- Implementation of the relationship call will further your relationship with clients beyond business matters.

Annual Service Call

- A regularly scheduled, outbound call, used to check-in with general client servicing which is made by the Assistant.
- This call should weave in Client Profile information for high value clients.

Moments of Truth

- A procedure designed for you to acknowledge Moments of Truth, often with an appropriate gift, for personal and professional events.
- Demonstrate that you are paying attention to your client by recognizing their important life events.
- Moments of Truth recognitions are based on the Client Profile information.
- This is a high impact activity to enhance trust and build depth into relationships.

Thanksgiving Cards



- Send a quality card with an inspiring message to the AAA and AA clients to genuinely show your gratitude.
- Ensure the message is *handwritten* and the envelope is hand-addressed.