

CUSO Core Client Service Activities Overview

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.



Proactive Calls

Annual Service Calls

- A regularly scheduled, outbound call, used to check-in with general and administrative items in a proactive manner.
- Conversations are based on account information.
- These calls can be made to all clients if there is a capacity to do so.

Relationship Calls

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

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.



Moments of Truth

- A procedure designed for you to acknowledge moments of truth, often with an appropriate gift, for personal and professional events.
- Demonstrate you are paying attention to your client by recognizing 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.