

# Welcome to CUSO Proven Strategies Advantage

The CUSO Proven Strategies Advantage is a unique, purposeful and systematic program to managing your client relationships. This program provides you with a pragmatic and sequential approach to building and enhancing relationships with both the new and prospective clients who you serve each day.

The training program is broken down by strategies covering the following major topics:

## Introduction & Orientation

These strategies will introduce you to our philosophies and approach as well as, help you learn how to prioritize and organize your time in a way that will help you achieve your goals.

## PILLAR 1: Client Analysis

These strategies will provide you with a framework for sorting and organizing your existing clients as well as, creating a heightened sense of awareness around the types of clients who bring to value to you and your organization. It will also provide an opportunity to take a 'snap shot' of where your business is today. This is important for measuring your future success.

## PILLAR 2: Client Experience

These strategies will provide you with specific information on how we will work together to build the foundation of strong client relationships. This includes a concept on how to create great chemistry with your most valued client, as well as a framework to create a consistently superior client experience.



## PILLAR 3: Client Onboarding

These strategies are dedicated to the New Client Process and will outline the sequential steps of bringing a new client onboard to you and your organization. New client growth is important and each new client that comes to you provides an opportunity to fully introduce and welcome them to your Credit Union/organization the right way each time.

## PILLAR 4: Client Rebranding

These strategies are dedicated to the Existing Client Process, which outlines the sequential steps of rebranding your existing high value clients to enhance client loyalty. This is often an overlooked group – one that offers great potential! These clients not only need to be competitor-proofed, but are poised to become our advocates.

## Road to Success

This final strategy is dedicated to help you progress forward with the concepts introduced to you in this program. It provides you with a clear track to run on once the regular coaching calls are complete.