

Get Started: MFIS

MFIS Professionals are in a unique position to build and create a rewarding and prosperous financial career – working alongside and being mentored by some talented, dedicated financial professionals. This provides you with an opportunity to create both personal and professional success using these best practices – with you in control of your future achievements and accomplishments. It is also a great time to identify your Professional Goals and Time-Frame for progressing in your career.



Along with this entrepreneurial freedom comes enthusiastic support by others, specifically your peers, financial planners, assistants, other branch employees and the entire CUSO Team. Therefore, it's important you establish and maintain a solid relationship with each of them. In addition, it is important you understand the roles and responsibilities of anyone available to support you while you manage your clients, so you can maximize these resources – however limited they may be.

It is important for you:

- To understand how to thrive in your role as an MFIS Professional.
- To understand how to share feedback and interact with your peers.
- To understand the role of those able to assist you at the Credit Union/Organization.
- To understand how to gain support and guidance from your Manager.
- To understand the communication protocol for working well with others at the Credit Union/Organization.

This type of understanding will enable you to become aware of how you can benefit from available support. It will also help you understand how you can integrate yourself and work effectively within the Credit Union/Organization. Finally, it will create order and structure around how you communicate and interact with others at the Credit Union/Organization. This directly impacts your quality of work life and allows you to go home each day feeling great about what you've accomplished.

Hold yourself to the following accountabilities:

- Deliver on the activities and responsibilities you have as a MFIS Representative.
- Ensure you implement each of the best practices in this program.
- Work in partnership with your peers and other Credit Union/Organization employees for continued guidance and support.
- Communicate regularly with your Manager to ensure you are on track.
- Work with all others at the Credit Union/Organization in a professional and respectful manner.

When working with others at the Credit Union/Organization, ensure you continue to be professional and respectful. And, take the time to adequately acknowledge and thank those helping you for their efforts in assisting you. The relationships you forge now will benefit you throughout your career at the Credit Union/Organization.

Working Successfully & Independently

You can be in control over every aspect of your client servicing. This simplifies the process in many ways as you will always know the status of each client personally.

The key to your success with the Proven Strategy Advantage program will be your ability to carefully assess and make smart choices about how you allocate and use your time. There are many things you do on a daily and weekly basis which clearly help you be successful.

Some of the things we'd like you to do as we go through this program include:

- Be conscious about the actual amount of time you have available to meet client needs
- Be fully aware of how many clients you service and which ones require extra servicing because of what they pay the Credit Union/Organization
- Make smart choices about how you allocate your time amongst your clients
 - Continue to do the things that work well for you
 - Make a commitment to change the things that don't work well for you
- Prioritizing activities in a way that will ensure you competitor-proof your best clients
- Redefining boundaries for over-demanding clients
- Deliver client service standards you are proud to deliver, but are also completely manageable
- Adopt new processes to create efficiencies in how you serve your clients
- Practice proactive client management to restore order to your work life and a sense of calm to your day

Being open to these areas will allow you to take control over your client management and create a career that will be successful and fulfilling, while also enabling you to achieve your personal accomplishments.