



July 2020 Edition #13

PSA UPDATES

The inaugural group of **MFIS PSA Training** has just been completed and the MFIS will begin their PSA Certification in July 2020!

Congratulations to **David Van Berkel and Eileen Turner** of **Christian Credit Union** who are now officially PSA Certified!



We look forward to launching the 2nd group of MFIS PSA Training in September!

ACE SUMMARY

All Advisory Teams who participated in the **ACE Review Process in Q4 2019** received updates in June as a mid-Year refresh on what their primary PSA Goals were for 2020.

I know some of you are well on your way to achieving everything that was set out and you continue to focus on delivering exceptional servicing to your clients – Hooray! Others of you are doing a reset for the back half of 2020 to create as much momentum and results for the balance of the year. Let's all end this year on a high note despite the unusual circumstances :)

As always, I'm available if you are looking for additional guidance and support on the specific items outlined in your individual [ACE Summary Report](#).



QUESTIONS FROM THE FIELD

"What are some of the activities we can focus on for getting ready for a successful Fall and 2020 wind down?"

Summer is often used for holiday times, relaxing, and taking a bit of a breather from 'busier times' of the year – despite the unusual circumstances we've encountered, the summer will likely be the same. Why? Well because from the time we were school-aged children we were trained to have a 'mindset' that September to June is go-go-go time AND July and August are just naturally more 'relaxed'. Being more relaxed, however, doesn't mean unproductive.

Here are a **few items** you can do to enjoy the summer months, but also feel like you've made solid progress moving your needle forward.

1. Plan and prepare for THANKSGIVING CARDS in October – Yes, the time is now!

Danielle makes this process so easy, all you have to do is pick the card, quote and tell her how many you need!

2. Block off time to simply catch up on “RELATIONSHIPS CALLS” with your very best clients.

This will be a wonderfully enjoyable task if you get into the mindset and will more than likely uncover Moments of Truth you can acknowledge immediately or into the future, where you use Maximizer to trigger the reminder.

3. Send MEANINGFUL email communication.

Send interesting emails related to lifestyle and making the most of our current circumstances such as gardening, travelling locally, recommended books or movies, and exploring new hobbies and interests. Simple articles a page or so in length with a graphic or photo are easy to read and encourage engagement – send the actual article or a link to the article. You may even find a link to a short video 3 to 5 minutes in length.

4. Plan for REVIEW MEETINGS – Virtually or by Telephone.

Review Meetings often tend to be slower through summer months because you and/or your clients are away. Use this summer to catch up on any missed Review Meetings by offering the virtual option which is the next best thing to face-to-face. Start to look at your calendar for who is coming in September, October and November to get mentally prepared as well as, thinking about any updates to the PFO that will take place for those clients who have one OR rebranding with those who don't.

5. Think about CLIENT EVENTS.

YES - This is a great way to connect with clients in a fun and relaxed way, even if it is virtually for the next few months! You can host some very interesting topics – again think lifestyle and client appreciation, which is often way better attended than Market & Economical Updates (which do have their place!). Think about clients who are business owners or strategic partners – you may have an awesome Guest Speaker and topic at your finger tips. Remember invitations set the tone and excitement for the event – and always encourage clients to share the invitation with others who may be interested as this is a great way to be introduced potential new clients. There is so much to discuss on events that as I'm writing this, I'm thinking we NEED to do an advanced coaching webinar on this very topic!

6. Assess Your GOALS.

Sometimes just having a PLAN makes us feel better! Pull out your annual goals both professional and personal and assess, recognize and celebrate your wins and achievements. Carefully, analyze the challenges and how you can overcome them going forward. Think about what you want to achieve in the next 90 days and make it happen!

I recommend you look at the list of above and pick a few items you believe will **provide the most traction** based on what you've accomplished so far in 2020!

ADVANCED COACHING SESSIONS

We had what I sincerely hope was a meaningful “**Mid-Year Reboot**” session in **June** for everyone at CUSO. If you were unable to attend this session, it is available on the CUSO Training Portal in the Advanced Coaching Session.

We are presently assembling additional **Advanced Coaching Topics** for the rest of 2020 so you can expect more information on topics in September and November 2020 (though I’m sure **EVENTS** will be one of them!). Suggestions and ideas always welcome :)



A friendly reminder to create **DAILY HABITS** around **saving emails** to client files as well as, **updating FORM Information** and **uploading Financial Plans and other client-specific information** to Maximizer.

1. Use the “Send & Save” feature of Maximizer whenever you **send an email** AND “Save” all **inbound client emails** as soon as you read them.
2. Take a few minutes to go into each **FORM profile** as you are preparing for Meetings or Phone Calls with your high value clients.
 - Update them at that time and then of course, after your meeting or phone call.
 - Take special note of upcoming Moments of Truth and trigger those reminders with enough lead to so you have a ‘margin of safety’ related to delivery.
3. When in the Household Record, simply click on the “Files” Tab and use the “Add” button to **easily upload Word Docs, Excel Files and PDFs!**



A great way to initiate any new daily habit is to simply to set a 15-minute task or appointment **every day** that shows up on your Maximizer Calendar or Hotlist. This is a best practice I personally use to keep me on track with daily, weekly and monthly activities that I know will help me stay organized and on track.

If you find you have extra time during the summer, which can sometimes be ‘less busy’ than other times of the year, seize this opportunity to catch up on the three items above. It’s like a big spring clean up with your digital client files – and it feels GREAT when it’s done :)

Have an outstanding, sunny and wonderful month of July!

