

The CUSO PSA and Your Success


You've just spent close to a year fully entrenched in the CUSO Proven Strategies Advantage program. And, although the bi-weekly training sessions are over, now is when the fun begins! Really, it does.

As of right now, you don't have to worry about reviewing more strategies, submitting answers or processing anything new. You can simply focus on what you've learned in the CUSO Proven Strategies Advantage program and deliver it at a grass roots level with the clients you manage every day. And let's not forget WHY the PSA is so important...

The PSA Results

Connect the dots and make sense of the complex world in which these teams operate to:

- Gain Control & Create Consistency
- Coordinate Efforts & Be Compliant
- Exceed Client Expectations
- Strategic Allocation of Resources
- Be Profitable & Achieve Goals
- Reduce Stress & Improve Quality of Work Life
- Restore Passion and Enthusiasm in Career



We understand it can sometimes be challenging to adopt new processes. After all, we are creatures of habit. We also understand how it can be equally challenging to maintain high levels of enthusiasm and motivation once the regular weekly coaching calls are complete. That's exactly why we want you to be fully aware of all the resources available to you to ensure your continued success with the CUSO Proven Strategies Advantage. This will ensure each one of you is successful and enjoys good working relationships with all your clients.

Please keep in mind that most advisors and advisor teams who pay for this coaching service and other coaching services out of their own net income are seeking change. Typically, the changes can be more revenue but also often more control of their practice and a greater control over their lives. If you are motivated you will change your behaviors, behaviors become habits and habits become processes. This is an exciting opportunity if you are motivated to change.

Supporting Your Success: Our People

First, you need to be aware you are always supported by the human resources available at CUSO.

To grow and succeed, you need to be organized with your role and your interactions with other Credit Union/Organization representatives, especially those who play a part in servicing and/or working your clients in some other capacity (i.e. banking and loans).



As it relates to your successful implementation of CUSO Proven Strategies Advantage (or anything else related to your position for that matter), we encourage you to look to the dedicated CUSO team who are here to help you.

Now, we recognize that our organization is fortunate enough to attract the kind of individuals who are fully capable and will excel at their respective position. We just wanted to remind you, you are not alone. We are here to help you.

Supporting Your Success: Our Policies & Procedures

Next, you need to be fully aware of the policies and procedures your Credit Union/Organization has developed to ensure consistency as it relates to your role as a Financial Planner. This ensures all operations within the Credit Union/Organization are run effectively, consistently and are compliant. It also provides you with structure which enables you to be more efficient and proactive in your role - which is often directly linked to higher job satisfaction.

It's important you are aware of and follow policies and procedures as it relates to every aspect of your role in client servicing.

Supporting Your Success: Our IT Systems

Your contact management system (CRM) will play a crucial role in helping you organize and implement everything you learned in this program. It should become the hub of your business and how you operate each day.

What you do each day to provide the ongoing client servicing and strive to create the exceptional client experience should be driven by the future tasks and servicing activities, FORM information and history of each client captured in detail on the CRM. Make a commitment to learn more about the CRM you use and harness the value it can provide in terms of making your processes turn-key.

Supporting Your Success: Communication

Finally, continue to participate in meetings with your team at the Credit Union/Organization and/or peers. The best practices covered in the CUSO Proven Strategy Advantage program should be showcased and reinforced on the agenda week-in, week-out -- especially in the early stages of

implementation. This weekly venue provides everyone an opportunity to share their feedback, stories and comments on a regular basis.

Our clients' success is important. What clients want most is to trust the financial organization and financial representative they work with. Creating an awareness of the various firm resources available to you as well as, knowing the procedures supporting your role is a critical ingredient in creating and maintaining this trust with our clients.

Now, your success is equally important to us. Your Credit Union/Organization values your contributions to the client experience and ultimately, the growth and success of the organization. We are here to help you succeed; just as you are here to help us succeed.

That's team work in action.