September 2020 Edition #15

PSA UPDATES

The 2nd group of **MFIS PSA Training** is beginning on September 23, 2020!

The inaugural group of **MFIS PSA Training** is in the middle of their PSA Certification with plans to have everyone PSA Certified on/by the end of 2020.

As always, previous participants are welcome to listen in on any of these calls as a refresher – with no homework or assignments (hooray)! We are also looking to call upon ambassadors for concepts covered in the PSA to contribute to some of these training calls so if there is a particular concept or tool that you have found to be especially helpful or useful to you, please reach out to me and let me know so I can include in our list of 'guest speakers'. No pressure, just a few minutes or so explaining what your take-away was and how it's impact you, your team and/or your clients. You all know, I can speak at nauseam about how awesome this program is, but it doesn't come close to hearing a peer share their own success with it :)

ACE SUMMARY

I look forward to initiating the **ACE Recognition Process** with you again this Fall and seeing all of the progress! You will be seeing signs of this shortly.

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 FOR THE FIELD

I had the opportunity to have sessions with several CUSO Financial Planners and MFIS Representatives over the spring & summer and one of the questions I asked them was "What have you been doing as it relates to Moments of Truth for your best clients lately?"

As always, I was impressed by *many* of the stories being shared by individuals who were clearly committed to paying attention to their best clients and doing random acts of acknowledgment to show them they matter and that they were listening. There were stories of people becoming parents and grandparents, people trying to celebrate retirement in the midst of COVID, likewise with milestone birthdays – and of course the challenging events like people having surgeries, losing their job and/or business, and the passing of loved ones. All of this is still happening – despite the pandemic. Congratulations to everyone I spoke with who shared these stores and the various ways you acknowledged them – along with the gratitude you receive from your best clients for doing so.

One story I'd like to share is a simple one. It involved a high value client who lost their job during COVID and now faced financial uncertainty. The MFIS simply responded to the client by letting them know how sorry they were to hear about their job loss, that they were thinking of them and to let them know how they could help – in other words, they showed genuine care and compassion. Shortly thereafter, the client contacted the MFIS to let them know they were receiving a sizeable severance package as a result of their job loss and that they were going to roll over to the MFIS. I can't tell you how many times I hear about things like this after Moments of Truth are delivered – *Oh Sherri and then they brought me there investments from xyz firm OR they wanted to do some insurance and estate planning OR they referred me to a friend.* The primary objective of Moments of Truth is to show your clients you care. The natural biproduct is good things happen.

I did, on the other hand, speak to some individuals who had done very little if anything in this regard. I worry about this. And, I hope they might be inspired to do more for their best & favorite clients.

THANKSGIVING IS COMING!

Yes, we are only **6 short weeks away from Thanksgiving** – Wow! For local clients, that means getting those cards in the mail in 5 weeks (one week prior to Thanksgiving) and for clients further way, mailing them in only 4 (two weeks prior to Thanksgiving)! Keep in mind that due to COVID, the mail moving through Canada Post has been taking longer in some cases – so plan accordingly.

Set some time aside on your calendar each week this month to begin signing your Lavish Cards and be sure to start with your AAA, AA and A clients! Make your sentiment to these clients sincere, meaningful and impactful – they will really appreciate it. Any other clients (AF & B) can have a shorter message inside if needed because I know some of you have so MANY of them.

If possible, have the client's address handwritten as well and always mail these using a fall-themed stamp.

ADVANCED COACHING SESSIONS - REMINDER

The next series of Advanced Coaching Sessions is going to focus on **Working with Your Strategic Partners** – both internal and external. In this webinar you will:

- Learn the difference between a Strategic Partner and a Centre of Influence
- Identify Your Current Strategic Partners – Internally and Externally
- Understand You have "Traditional" Strategic Partners and "Non-Traditional" Strategic Partners – We will Think Outside the Box!
- Develop a Proactive and Professional Approach to Managing these Important Relationships
- Create a Process to Expand Your Current Network of Strategic Partners

Like everything else in the PSA Program, this is about quality over quantity. Having a handful of Strategic Partners can provide you with a steady stream of high quality prospective new clients to supplement those you receive from the branch and within your existing client base.

This session will be offered on **Wednesday, September 9th at 1:05 PST** and you will receive an invite from CUSO if you haven't already! This session will be recorded and uploaded to the CUSO Portal if you are unable to attend.

Your suggestions and ideas for other advanced coaching topics are always welcome :)

MAXIMIZER CRM

Email Integration with your Maximizer is very important from a client relationship and compliance perspective. I don't know if your Outlook is like mine, but it is horrendous! I receive so many emails everyday and yes, I do have a filing system but at times there are too many and I have to 'archive' which means they are hard to search and find sometimes. Have you ever tried to find an old email to reference from someone??? Sometimes it can be a nightmare and I shudder to think of the time wasted searching through our sent folders! There is a better way, I assure you :)

Every time you send an email from Outlook hit **"SEND & SAVE"** and it will automatically look to your Maximizer data base for an email address that matches the one you are sending it to. If it can find one, it will pull that contact record up and you can 'check the box' and hit 'ok' to save it to their Contract Record – it's super easy! If it cannot find a matching email address, you can always manually enter the last name of the client and it will pull them up and THEN you can 'check the box' and hit 'ok'. This is the perfect time to add and/or update email addresses!

Note: When you do this, there is a box on the left-hand side that you can check to "Include all attachments" so if you are sending correspondence like letters, projections, information, etc. – click this box so it is all uploaded to the client Contact Record.

The same is true when **you receive and email from a client**, you can simply hit "**Save to Maximizer**" on your top tool bar and the same options as described above are available.

To learn more about installing the Maximizer Outlook Plug, go to www.cuwealth.ca and access the **CUSO Magical Portal** and then click **Partner Portal → Maximizer Training → Maximizer Training** – Extra (it's the fourth training video listed).

WELCOME TO…