October 2020 Edition #16

ACE SUMMARY

It's that time of year again (yes, already) and I will be reaching out to all Advisory Teams who have been PSA Certified to begin the **Annual Client Experience recognition process in October (yes, this is now!)**.

The purpose of the ACE process is to ensure the culture, processes, and approach to the client experience at CUSO continue to focus on the provision of **service excellence and high levels of professionalism** as it relates to:

- Bringing each and every new client on to work with us in a unique, client-friendly and highly differentiated way;
- Servicing all of our clients on a proactive ongoing basis to exceed their expectations; and
- Ensuring we have made measurable progress in efforts to fully update and reset relationships with our existing high value clients.

A key part of this review is full integration of the essential tools for Advisory Teams which includes financial planning software and Maximizer CRM, to name a couple!

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.

PSA UPDATES

MFIS Group 2 PSA Training

Group 2 began their MFIS Training on **September 23, 2020** and we already have two full training sessions under our belt! I'm so delighted to work with this second group and in doing so am pleased to welcome some new CUSO Partners to the MFIS Training – Aldergrove Credit Union, Christian Credit Union, and East Kootney Credit Union! The first round of training allowed us to work with MFIS from SunCu Financial, 1st Choice Savings, and Lakeland Credit Union.

MFIS Group 1 PSA Certification

Group 1 began their PSA Certification this process this summer and all those registered and active with clients are expect to be fully certified on/by **December 2020**!

Advisory Team & MFIS Group 3 PSA Training

We are pleased to kick off a round the full PSA Program for Advisory Teams and another round of MFIS Training with orientation calls set for **December 2020**, with full program delivery in 2021.

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 :)

QUESTIONS FROM THE FIELD

"What kinds of things can we focus on to finish STRONG in 2020 despite the unusual year we've had due to COVID?"

Here is a quick list of THREE activities you can focus on to make the most of Q4 2020 and be totally set for 2021:

1. Reach out and **CONNECT WITH YOUR HIGH VALUE CLIENTS** – do something to let them know you are thinking about them!

    - Get your **Thanksgiving Acknowledgements** out **asap if you haven't already** – the time is NOW!
    - Be disciplined and follow through with all **Review Meetings** triggered on Maximizer and offer them **virtually**; and
    - Time-block each week so you can fully manage your **Relationship Calls**.
    - Pay attention to **Moments of Truth** – the good, the bad, and everything in between. The small stuff, is the BIG stuff :)
    - If you see an **article or video** that is life-style oriented you think they would enjoy, send it along!

2. Get on Top of Your **MAXIMIZER ORGANIZATION & INTEGRATION**:

    - Clean Up Your Hotlist using the 4 D Approach – Do, Defer, Delegate or Delete.
    - Be capturing all aspects of FORM for your high value clients.
    - Actively use the core fields related to PFO, Moments of Truth, Referrals, etc.
    - Use the Action Plans when bringing on and/or transitioning clients to ensure the process is consistent and easy to follow – but most importantly, pleasant for the client!

3. Map out your **2021 GOALS** along with the activities that will help you achieve them.

    - Get inspired and excited for the year ahead – always focus on what you can control, not on what you can't!
    - This includes carving out holidays and personal time off that you can look forward to – these breaks are a necessary part of keeping you energized and motivated.

ADVANCED COACHING SESSIONS

Expanding Your Strategic Partners – Part 2 is being offered on **November 4, 2020**.

This is a follow up session to **Strategic Partners 1** delivered on September 9th where we defined what a Strategic Partner is and got everyone thinking about their current and potential partners. We also talked about internal and external strategic partners as well as, traditional and non-traditional partners.

The Strategic Partner Part 1 recording can be found in the on the Partner Portal, along with all of the resources accessible individually for your ongoing use.

PART 2 of this webinar will specifically cover the **FIT Process to successfully expand your External Strategic Partners** (including Agenda, Cover Letter's, etc.) as well as, **provide specific strategies on how to work best with your Internal Strategic Partners --** both of which, will help you receive a steady stream of quality referrals**.** Each of these topics will be covered in great detail.

As always, we welcome and encourage your questions, comments and experiences as it relates to working with your Strategic Partners!

MAXIMIZER CRM

I want to share with you a personal Maximizer Tip that I have always used to help myself stay organized and proactive as it related to my ongoing regular activities – those which are not attached to specific clients I serve (client-specific items should always be tagged to the appropriate client household record). This is something I encourage everyone using Maximizer does as a means of centralizing important information, activity triggers, and emails for themselves.

> **STEP 1 – Create a HOUSEHOLD CONTACT for yourself** personally if you haven't already. This will become a centralized 'digital folder' for you to keep, store and trigger a variety of information (see below).
>
> **STEP 2** – **Save ALL important EMAILS** that you may need to refer to (not client-specific) in your Household Contact for instant, easy access (No more digging through Outlook - Hooray!).
>
> **STEP 3** – **Set ONGOING and RECURRING appointments, activities & tasks** for yourself related to things you do daily, weekly, monthly, quarterly, annually to help you stay on track (again, these are not client specific) – for example daily "Confirm all appointments for tomorrow" and weekly "Track on incoming new accounts and transfer-ins", "Weekly Team Meeting", or "Make Relationship Calls".
>
> **STEP 4** – Capture **IMPORTANT INFORMATION in the "Notes" section** as appropriate – this could be keeping lists of contact information, websites, holidays taken & planned, passwords, etc.

I hope this tip serves you well in forging ahead not only for the final few months of 2020, but also into 2021 and beyond…


Dear October,
I am going to make you
AWESOME!