



*Our experienced professionals take a customized approach to deliver the best investment, trust and insurance programs for credit unions.*

**Insurance**

**Investments**

**Trust Services**

## **Coaching Solutions**

GSG has a team of experienced Investment coaches available to support your needs. We offer customized solutions aimed at bringing your program or individual practice to the next level of success. These are a sample of the coaching options available but feel free to call us to discuss your specific needs.

### **Program Manager Support Options**

This solution was designed to provide quick access to experienced, licensed support for the Program Manager whether on a temporary project basis or for a long-term, part-time basis. As programs grow, additional support is often needed but not sufficient to justify hiring a full-time employee. Seasonal projects also arise and having access to a trusted experienced team to help handle them is vital. GSG's team is here to help coordinate repapering in a broker/dealer change, scanning or file copying, privacy mailings, marketing plan implementation, etc.

- Perfect solution for Program Managers who are handling a transition to new broker/dealer; bringing on new personnel; needing a large quantity of scanning; data entry to b/d system; privacy mailing support, etc.
- Provides transition help to the new Program Manager so they can hit the ground running.

### **Investment Representative Coaching**

GSG also provides a full-range of coaching solutions designed to help all levels of performers.

- Helps top performers or high potential investment reps get to the next level by identifying new targets, expanding marketing plans, etc.
- Evaluate a practice for transition to fee-based approach
- Evaluate need for personnel expansion or ways to create a team structure with Associates and Assistants
- Personal support to reach top producer status

### **Sales Assistant Training & Coaching**

GSG understands the importance of the Sales Assistant to building a top practice. We provide a number of options to support your Sales Assistant(s) to increase efficiencies and build the business in four key areas:

- Operations, business planning, sales and services, and product knowledge.
- We offer one on one coaching and a monthly group training program with other assistants across the U.S.

### **Specialized Coaching Tracks**

Successful investment programs seek out opportunities and leverage existing financial institution relationships. We can help you integrate more closely through the following coaching programs:

- *SEG and Business Development Training* - Help employers deliver greater value while assisting credit union business development specialists
- *Branch Sales Training* - Help increase sales by allowing branch staff to become problem solvers vs. order takers.

---

[www.gsgllc.com](http://www.gsgllc.com)

800-915-1005

[judysandberg@gsgllc.com](mailto:judysandberg@gsgllc.com)