



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.

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