

TGS-2024047775

IN-PERSON WORKSHOP

Client Relationship Management: Building Relationships in Every Touchpoint For ARMs & JRMs



Target Audience

For Assistant Relationship Managers (ARMs)
& Junior Relationship Managers (JRMs)

Duration: 4 CPD Hours

Fee: SGD 650 per participant

EARLY BIRD DISCOUNT

Enjoy **10% discount** when you register **one (1) month before** the course commencement date.

Learning Objectives

Identify & Apply CRM Tools & Capabilities to help build client relationships and facilitate in sales finding opportunities in every client touchpoint.

Strengthen your ability to engage clients meaningfully and transform every interaction into a lasting relationship.

>> CRM Framework

1. Finding Qualifying Leads

- Getting leads through referrals
- Qualifying prospects

2. Understanding Needs

- Communicating with clients effectively (on phone and email)
- Identifying Needs vs Wants/Preferences (on products/services)
- Questioning Tools

3. Finding Opportunities

- Listening Tools (Clues & Cues)
- Importance of keeping client data/records
- Adding product/services to leads and raising up to the RMs for actions

4. Monitoring Client Satisfaction

- Monitoring client satisfaction and reporting accounts at risk to the RMs

PRACTICE & APPLICATION

- Engage in realistic role-plays to qualify leads, uncover needs, and build trust.
- Work on interactive case studies to apply CRM tools in real-world scenarios.

KEY VALUE PROPOSITION

- Applies momenta's signature hands-on approach: practical tools, role-plays, and guided feedback to embed CRM skills.
- Delivers strategies to strengthen client trust, identify opportunities, and boost satisfaction.
- Equips professionals with confidence and clarity to build sustainable client relationships at every touchpoint.

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level: Customer Relationship Management – 3

Participants are encouraged to access the IBF MySkills Portfolio (<https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio>) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role. Find out more about IBF certification and the application process on [here](#).

Up to 70% Funding*
for Singaporeans and PRs

Funding:
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