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IBF-STS

TGS-2024052004

IN-PERSON WORKSHOP

Wealth Advisory Program 3.0

Winning New Clients

Target Audience
Private Bankers, Wealth Managers, Financial Advisors, Retail Bankers

Duration: 8 CPD Hours
Fee: SGD 1300 per participant

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

Key Learning Outcomes

- Strategically calculate the precise number of prospects needed to attain NNM targets, enabling optimal allocation of time & effort
- Have a clear client acquisition plan, applying the tools & techniques to drive conversion of leads to account opening
- Clearly & convincingly articulate both personal & bank's value proposition

Drive efficient client acquisition and sustainable growth through purposeful prospecting and action planning.

Build trust. Engage. Win clients.

1. **Key Topics**
   - The Wealth Management Client Sales Process (7 Steps in Getting New Clients)
   - Challenges in Acquiring NNM from New Clients
   - 3 Types of Client Conversations
   - Successfully Engaging Clients From Previous Bank(s)
2. **Framework & Tools**
   - Prospecting and Planning Tools (Business Plan, Calculator)
   - Trust-Building and Buying Style Frameworks (Trust Formula, mDISC)
   - Structured Client Engagement Models (R.O.A.D.M.A.P., Questioning Loop, H.C.F.)
   - Communication and Listening Techniques (4 Es, Clues & Cues, 6 Cs, A.B.C.)
   - Portfolio and Solution Approaches (SAA/TAA, 6 Cs Framework)

PRACTICE & APPLICATION

- Prospecting Role Play Scenarios
- Formative Assessment –Prospecting Role Play Scenarios
- Quiz

KEY VALUE PROPOSITION

- Bank's value proposition & advisory process are integrated into the training
- Refine prospecting skills through roleplay, coaching, & feedback
- Practical Prospecting Business Plan Template to increase client acquisition success

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level: Future - Enabled Skills - Customer Acquisition Management (Proficiency Level 4)

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
Terms & Conditions apply

Funding:
IBF Standards training Scheme (IBF-STS)

www.momenta.biz

Penny Tang: +65 9003 2890 | penny.tang@momenta.biz