IBF-STS

momenta
leadersdrivingperformance

TGS-2023036965

IN-PERSON WORKSHOP

Business Development & Client Experience Management

Target Audience
Assistant Relationship Managers & Junior Relationship Managers

Duration: 4 CPD Hours

Fee: SGD 500 per participant

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

Learning Objectives

- Create and manage a great client experience by applying client service knowledge and enhancement opportunities.
- Analyze client needs and expectations to generate new business referral opportunities.

Equipping professionals to build trust, uncover opportunities, and deliver exceptional client experiences that drive business growth.

Program Flow

- **Awareness**
  - What are the different phases of your client's experience?
  - For each phase, what would make it a good vs bad experience?
  - How can you leverage those great client experience to further build the business from ne w clients/existing clients?
- **Tools & Applications:**
  - Planning & positioning
    - Prospect segmentation
    - Articulating your personal value proposition
  - Building rapport & trust
    - Trust formula
    - Recap: Effective communication – mDISC
  - Uncovering needs & opportunities
    - Questioning skills: Uncovering client needs
- Uncovering needs & opportunities (con't)
  - HCF – Understanding needs/requirements (history, current & future)
  - Listening for Clues & Cues
- Service Delivery
  - Bank's service delivery guidelines and standards
  - Bank's product/service knowledge
  - Recap: Conflict resolution techniques
  - Handling objections
  - Review and analyze client service feedback

Program includes:

- **Scenario-Based MCQ Case Assessment**: Tests participants' application of the lessons in real-life scenarios.
- **Action Planning:** Supports participants in mapping lessons to their real-world client work.

Format & Approach

- Interactive exercises, real client scenarios, and guided action planning ensure participants can immediately apply their learning.

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Customer Experience Management (Proficiency Level 3)
- Business Opportunities Development (Proficiency Level 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 https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified

Up to 70% Funding*
for Singaporeans and PRs
Terms & Conditions apply

Funding:
IBF Standards training Scheme (IBF-STS)

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