IBF-STS

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leadersdrivingperformance

TGS-2022602327

IN-PERSON WORKSHOP

Wealth Advisory Program (WAP): Module F Pitching & Negotiating

Target Audience

Relationship Managers, Assistant Relationship Managers, Retail Bankers, Independent Financial Advisors, Insurance Agents

Duration: 6.5 CPD Hours

Fee: SGD 1,200 per participant

EARLY BIRD DISCOUNT

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

Learning Objectives

- Confidently pitch with clarity and conviction
- Navigate pricing and negotiation discussions effectively to achieve win–win outcomes

This workshop equips wealth and financial professionals with practical skills to pitch persuasively, negotiate strategically, and build stronger client relationships from first engagement to closing with confidence.

PITCH & NEGOTIATION FRAMEWORK

A. Pitch

1. Preparing Yourself

- Speaking with conviction and confidence
- Best practices for effective delivery
- Grabbing attention through sound bites, storytelling, and personality

2. Designing an Effective Pitch

- Structuring your pitch: opening, middle, and close
- Creating visuals that enhance your message
- Managing multitasking during presentations (think, talk, type)

3. Engaging Your Client

- Asking questions that stimulate thinking and drive engagement
- Anticipating and handling objections
- Using data, visuals, or video to support your point
- Synthesising key messages and delivering a clear call to action

B. Negotiate

1. Before the Negotiation

- Understanding the negotiation plan and process
- Legislative and regulatory considerations
- Selecting appropriate communication channels

2. During the Negotiation

- Building rapport and collaborative relationships
- Strategic questioning and active listening
- Applying negotiation tactics and tools

3. Buying Signal

- Identifying readiness to proceed
- Knowing when and how to extract a "Yes"

PRACTICE & APPLICATION

- Role-plays based on real client scenarios
- Hands-on pitching and negotiation practice
- Facilitated feedback for immediate improvement

KEY VALUE PROPOSITION

- Stronger persuasion and negotiation confidence
- Improved pricing and value discussions
- Practical tools applicable immediately in client engagements

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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