

TGS-2022602052

IN-PERSON WORKSHOP

C.A.T.C.H. New Clients

5 Effective Digital Networking & Prospecting Strategies



Target Audience

Private Banking Relationship Managers,
Private Bankers, Wealth Advisors and
Family Office Professionals

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.

Learning Objectives

- Build a networking rhythm through digital & in-person channels
- Confidently attract & engage prospects digitally (& in-person)

Drive confident client acquisition through effective digital networking, purposeful prospecting, and impactful client conversations.

>> Course Outline

1. Create Your Persona

- Value Proposition (Own & Bank's)
- Digital Presence

2. Activate Digitally

- Direct & Indirect Marketing
- Digital / In-person Networking Etiquette

3. Talk with Impact to Leave a Positive Impression

- Getting Prospects to Pay Attention & Listen
- Speaking More with Less Words
- Crafting a Memorable Introduction
- Starting with Your "Why"
- Deepening Rapport in 3 Minutes
- Looking for the Hook
- Asking Questions

4. Create Your Direct

Engagement Activities

- Topics that Pull Prospects In
- My Networking Plan
- Personal Marketing, Database & CRM
- Legal, Regulatory, Ethical & Socio-cultural Constraints in Networking
- Outreach
- Handling Awkward Situations

5. Hook & Reel In

- Reason for 2nd Meeting
- Deep Listening for the Hook
- Follow-Up & Follow-Through: The Next Steps
- How to Track the Sales Process

ASSESSMENT

- Formative Assessments - Case Study and Role Play Scenarios
- MCQ

PRACTICE & APPLICATION

- Role-plays to practise client conversations and prospect engagement
- Real-world scenarios to build confidence and fluency
- Exercises to apply digital networking and prospecting techniques
- Guided feedback to reinforce learning and application

About IBF Certification

Technical Skills and Competencies (TSCs) and Proficiency Level (PL): Business Opportunities Development 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

Terms & Conditions apply
Learn more:

IBF Standards training Scheme (IBF-STs)



www.momenta.biz



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