

TGS-2024047775

IN-PERSON WORKSHOP

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



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

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

ASSESSMENT

- Formative Assessment – Case Studies / Role Play Scenarios
- MCQ

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.

About IBF Certification

Technical Skills and Competencies (TSCs) and Proficiency Level (PL): Customer Relationship Management (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 [here](#).

Up to 70% Funding

Terms & Conditions apply

Learn more:

IBF Standards training Scheme (IBF-STs)



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