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leadersdrivingperformance

IBF-STS

TGS-2024052003

IN-PERSON WORKSHOP

Wealth Advisory Program 3.0 – Building a High-Performance Team to Drive Business Results

Target Audience
Team Leaders of Private Bankers, Wealth Managers, 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

- Apply Sales Force Effectiveness (SFE) skills to enhance sales coaching, pipeline management, and revenue generation.
- Use people performance management frameworks, tools, and best practices to optimize sales performance.

BUSINESS OUTCOMES FROM THIS PROGRAM

- Equip Team Leaders to enhance Relationship Managers' performance, boost productivity, and client satisfaction through effective people performance management, resulting in improved business results within 6 months to 1 year.

1. Key Topics

- Competencies of a Team Leader – Mindset, Technical Skills, Soft Skills, and Knowledge (M.T.S.K.)
- Competencies of a Relationship Manager
- Sales Practice Discipline & Development – What to "Look Out For" in Your Bankers
- Skill vs Will and Corresponding Approaches
- Good and Bad Examples of Coaching
- Coaching on Sales Activities (Hunting & Farming)
- Team Leader Business Plan
- Building a High-Performing Team

2. Framework & Tools

- Performance Management Framework – A.C.T.O.R.
- Performance Coaching Framework – G.R.O.W.
- Feedback Model – S.B.I. Method
- Building Trust – Trust Formula
- Goal Setting & Coaching Rhythm – S.M.A.R.T. Goals

PRACTICE & APPLICATION

- Case Studies – The Top 5 Hunting & Farming Challenges
- Sales Practice Management – Case Studies & Role Play
  - Hunting Case Studies (5 Scenarios)
  - Farming Case Studies (5 Scenarios)

KEY VALUE PROPOSITION

- Holistic sales coaching on sales activities, including both hunting and farming.
- Enhance situation-driven leadership and coaching skills through role play, coaching, and feedback.

ASSESSMENT

- Formative Assessments – Role Play Cases on Coaching (Hunting & Farming)
- MCQ

About IBF Certification
Technical Skills and Competencies (TSCs) and Proficiency Level (PL): People Performance Management Level 5
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