Course Outline

Synergy *Greek: synergos - working together…of two or more agents to produce an effect greater than the sum of their individual effects*

CLIENT RELATIONSHIP MANAGEMENT

2025-26

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This programme can be tailored

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CLIENT RELATIONSHIP MANAGEMENT

3-day programme

OVERVIEW

- Understand how to create trust in the sales process
- Learn how to successfully build rapport with clients
- Acquire and apply proper discovery skills to define real needs and opportunities
- Position ideas and propositions to clients with greater impact
- Handle difficult situations and challenges with great skills and elegance

OBJECTIVES

Building behavioural skills to:

1. Create trust and credibility on sales calls
2. Influence client perceptions and decision making to get more deals
3. Manage the client sales cycle and close more successfully
4. Provide the tools to resolve communication problems and barriers and make the right impact

RESULTS

Increased self-confidence

Sharper communication skills

More satisfied clients, more sales

Greater ability to handle difficult relationships/challenges

TOOLS

The Insights behavioural model for identifying styles

A comprehensive behavioural report with suggestions and action plans

A chart for specifying client preferences

A client communication action plan doc

This programme includes role plays, simulations and case studies to ensure practice and stimulation for learning and application.

CONTENT:

1. The 3 critical roles of the relationship manager
2. Assessing your client base, marketing activity and growth goals – the importance of platform and prioritising
3. What is consultative/relationship selling? Why is it essential for financial market sales?
4. What are the essentials for creating trust?
5. The 5 key perceptions to shape when selling & influencing
6. Making appointments and targeting the right clients
7. Preparation and research for meetings – setting objectives
8. How to open meetings, make the right impression, get the client's attention and market the bank's services
9. Becoming a trusted advisor – how to influence authentically and powerfully – developing congruent messages
10. Advanced communication – adapting your approach to different client styles, goals and needs
11. Hi impact questioning and listening skills to truly understand client needs, priorities and challenges
12. How to sell benefits and present powerful and persuasive arguments with the client's co-operation
13. The 2 psychological levers that influence decision making
14. Understanding the sales cycle – adjusting our approach to different opportunities and contexts – keeping momentum
15. How to analyse and manage client blocks and barriers
16. Pitching effectively – different closing techniques to get more deals
17. Defining client types and decision influencers
18. How to profile and develop relationship management plans