MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

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WHOLESALE CLIENT MANAGEMENT STRATEGIES

““Maximizing Relationship Value and Growth Across Corporate & Institutional Banking Clients””

Schedule

Date	Venue	Fees (Face-to-Face)
18 – 22 May 2026	Dubai, UAE	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

Wholesale banking clients—including corporates, multinationals, government entities, and financial institutions—demand high-value, relationship-driven service. Managing these strategic accounts requires a blend of commercial acumen, industry expertise, and a client-centric strategy that prioritizes trust, tailored solutions, and sustainable growth.

This 5-day course equips professionals with a strategic approach to wholesale client relationship management. It covers segmentation, needs assessment, solution development, cross-selling, credit risk understanding, and portfolio optimization to deepen wallet share and client retention.

Objectives

By the end of this course, participants will be able to:

- Segment and prioritize wholesale clients based on value and potential
- Develop customized engagement strategies for key accounts
- Align financial solutions with client needs and sector dynamics
- Strengthen cross-selling, upselling, and client retention strategies
- Manage risks, returns, and profitability within the wholesale portfolio

Why Attend

- Enhance the profitability and longevity of wholesale banking relationships
- Build a consultative selling approach backed by industry and client insights
- Improve strategic account planning, service consistency, and delivery
- Align risk appetite with customer potential and internal credit frameworks
- Become a trusted advisor across complex institutional client ecosystems

Target Audience

This program is designed for:

- Relationship managers and client executives in wholesale, corporate, or institutional banking
- Product managers and sector specialists
- Credit officers and risk managers engaged in client due diligence
- Business development and strategic account managers
- Anyone responsible for managing, growing, or optimizing key client relationships

Individual Benefits

Key competencies that will be developed include:

- Relationship management and client portfolio strategy
- Sector-driven solution mapping and value creation
- Strategic account planning and revenue expansion
- Risk and return optimization within client engagements
- Cross-functional collaboration and service coordination

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved client segmentation and resource allocation
- Stronger relationship penetration and revenue growth
- Higher retention rates across strategic accounts
- Balanced growth aligned with credit and compliance standards
- Consistent delivery of institutional client experience

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings – Client strategy frameworks, segmentation models, and best practices
- Case Studies – Cross-sector wholesale banking client success stories
- Workshops – Account planning, revenue mapping, and client retention plans
- Peer Exchange – Wholesale RM challenges and solutions across industries
- Tools – Client engagement templates, relationship scorecards, and value maps

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Course Outline

Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Learning Modules | Coffee Breaks: 09:30 & 11:15 | Lunch Break: 01:00 – 02:00

Day 1: Foundations of Wholesale Client Strategy

- Module 1: Client Segmentation and Prioritization (07:30 – 09:30) • Tiering models, lifecycle analysis, and resource alignment
- Module 2: Needs Assessment and Sector Analysis (09:45 – 11:15) • Industry trends, client challenges, and solution design
- Module 3: Workshop – Client Mapping Exercise (11:30 – 01:00) • Build a relationship development strategy

Day 2: Engagement, Value Creation & Cross-Selling

- Module 4: Developing Relationship Roadmaps (07:30 – 09:30) • Goal setting, client touchpoints, and frequency plans
- Module 5: Value-Based Selling and Solution Design (09:45 – 11:15) • Cross-selling, bundling, and positioning for value
- Module 6: Workshop – Craft a Sector-Specific Offering Plan (11:30 – 01:00) • Link needs to products and services

Day 3: Credit, Risk, and Profitability Alignment

- Module 7: Risk Appetite and Client Fit (07:30 – 09:30) • Credit rating, exposure limits, and risk-return trade-offs
- Module 8: Monitoring Client Performance and Compliance (09:45 – 11:15) • Behavioral triggers, early warning signs, and compliance red flags
- Module 9: Workshop – Build a Client Credit Profile (11:30 – 01:00) • Risk-adjusted account management

Day 4: Strategic Account Planning & Execution

- Module 10: Strategic Account Plan Components (07:30 – 09:30) • Objectives, metrics, stakeholders, and timelines
- Module 11: Performance Review and Opportunity Tracking (09:45 – 11:15) • KPIs, pipeline management, and feedback loops
- Module 12: Workshop – Develop a Full Strategic Account Plan (11:30 – 01:00) • Use templates and CRM dashboards

Day 5: Relationship Management Excellence

- Module 13: Building Influence and Internal Collaboration (07:30 – 09:30) • Engaging product, credit, and compliance partners
- Module 14: Relationship Manager of the Future (09:45 – 11:15) • Digital tools, sustainability, and value beyond banking
- Module 15: Final Workshop – Client Relationship Transformation Plan (11:30 – 01:00) • Delivering sustainable relationship value

Certification

Participants will receive a Certificate of Completion in Wholesale Client Management Strategies, validating their expertise in managing, growing, and sustaining profitable relationships across corporate and institutional banking clients.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

In-House / Customized Training Interested in running this course for your team? Please contact us:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**