MAWA EVENTS

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CERTIFICATE IN RELATIONSHIP MANAGEMENT FOR CORPORATE & SME BANKERS

“Mastering Client Engagement, Portfolio Growth, and Risk Management in Business Banking”

Schedule

Date	Venue	Fees (Face-to-Face)
22 - 26 Jun 2026	Dubai, UAE	USD 3495 per delegate

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

Introduction

In an increasingly competitive and digitized banking environment, relationship managers play a pivotal role in sustaining client loyalty, deepening wallet share, and delivering advisory-driven solutions. This intensive training program is designed to equip Corporate and SME bankers with the strategic tools, sales techniques, and credit insights needed to effectively manage client portfolios and drive business growth.

Participants will gain skills in relationship mapping, financial needs analysis, structuring credit facilities, managing risk, and cross-selling value-added solutions. The program blends customer-centric strategies with technical banking know-how, helping bankers deliver measurable impact and sustained client trust.

Objectives

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

- Develop and execute client engagement strategies across corporate and SME segments
- Conduct effective financial needs analysis and structure customized banking solutions
- Strengthen credit evaluation and portfolio risk management practices
- Build relationship plans that drive retention and share-of-wallet growth
- Balance business development with compliance, ethics, and service delivery

Why Attend

- Gain a structured approach to managing banking relationships across segments
- Master practical techniques in needs-based selling and value creation
- Improve your ability to identify opportunities and minimize risk
- Enhance your confidence in dealing with senior client decision-makers
- Earn a certificate that validates your professional growth as a relationship manager

Target Audience

This program is designed for:

- Corporate and SME Relationship Managers (RMs)
- Business Development Officers and Loan Officers
- Client Relationship Executives in Corporate/Commercial Banking
- Branch Managers and Portfolio Managers
- Bancassurance, trade, or treasury sales staff engaging with SME/corporate clients

Individual Benefits

Key competencies that will be developed include:

- Client segmentation and portfolio strategy design
- Needs-based sales and cross-selling techniques
- Credit analysis and risk-adjusted return planning
- Negotiation, objection handling, and service recovery
- Customer onboarding, KYC compliance, and retention strategies

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved revenue per client and increased client retention rates
- Higher alignment between credit risk and business development
- Consistent application of client due diligence and relationship policies
- Efficient onboarding and proactive servicing of SME/corporate portfolios
- Enhanced internal collaboration between credit, operations, and frontline teams

Instructional Methodology

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

- Strategy Briefings – Segment-specific relationship models and KPIs
- Case Studies – Real client scenarios across SME and corporate banking
- Workshops – Build relationship plans, conduct needs analyses, pitch solutions
- Peer Exchange – Group feedback on client retention and sales experiences
- Tools – RM dashboards, cross-sell playbooks, credit structuring templates

Course Outline

Training Hours: 7:30 AM – 3:30 PM Daily Format: 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Foundations of Relationship Banking

- Module 1: Evolving Role of the Relationship Manager (07:30 – 09:30) • Client expectations, KPIs, segmentation
- Module 2: SME vs Corporate Banking Dynamics (09:45 – 11:15) • Needs, behaviors, compliance landscape
- Module 3: Relationship Mapping and Stakeholder Engagement (11:30 – 01:00) • Decision-makers, influencers, matrix clients
- Module 4: Workshop – Build a Client Relationship Map (02:00 – 03:30) • Develop stakeholder matrix for a key account

Day 2: Needs Analysis and Advisory Selling

- Module 5: Financial Needs Discovery (07:30 – 09:30) • Personalized vs transactional analysis
- Module 6: Advisory Conversations and Opportunity Spotting (09:45 – 11:15) • Asking questions that uncover needs
- Module 7: Cross-Selling and Value-Based Solutions (11:30 – 01:00) • Linking product features to client goals
- Module 8: Workshop – Simulated Client Discovery Meeting (02:00 – 03:30) • Role-play and pitch improvement feedback

Day 3: Credit Fundamentals for Relationship Managers

- Module 9: Credit Risk Basics for Non-Credit Staff (07:30 – 09:30) • Working capital cycle, leverage, liquidity
- Module 10: Facility Structuring and Documentation (09:45 – 11:15) • Lines of credit, collateral, pricing
- Module 11: Early Warning Signs and Risk Monitoring (11:30 – 01:00) • Behavioral, financial, market triggers
- Module 12: Workshop – Structure a Credit Facility (02:00 – 03:30) • Use a client profile to structure facilities

Day 4: Portfolio Management and Service Excellence

- Module 13: Managing a Healthy RM Portfolio (07:30 – 09:30) • Client grading, exposure control, NPL prevention
- Module 14: Service Level Management and Complaint Handling (09:45 – 11:15) • Escalation protocols, feedback loops
- Module 15: Relationship Profitability and ROI (11:30 – 01:00) • Pricing for risk, return per client segment
- Module 16: Workshop – Build a Portfolio Action Plan (02:00 – 03:30) • Strategies to grow, retain, or exit clients

Day 5: Personal Branding, Ethics, and Certification

- Module 17: Professional Branding and Communication (07:30 – 09:30) • Trust-building, visibility, digital tools
- Module 18: Ethics and Governance in Client Management (09:45 – 11:15) • Fair treatment, data privacy, anti-bribery
- Module 19: Final Role-Play – RM Client Review Meeting (11:30 – 01:00) • Simulate portfolio review discussion
- Module 20: Assessment & Certification Wrap-Up (02:00 – 03:30) • Review, feedback, certificate briefing

Certification

Participants will receive a Certificate in Relationship Management for Corporate & SME Bankers, recognizing their ability to manage complex client relationships, align solutions with business needs, and support sustainable growth and risk balance in the banking sector.

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**