MAWA EVENTS

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

Phone: +601116373203 | **Email:** info@mawaevents.net

CLIENT RELATIONSHIP MANAGEMENT IN FINANCIAL SERVICES

"Building Trust, Loyalty & Profitability Through Strategic Relationship Management"

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

In today's competitive financial landscape, strong client relationships are the cornerstone of long-term success. This course equips financial professionals with the advanced skills needed to build trust, deepen client loyalty, and drive business growth through effective relationship management.

Participants will explore client engagement strategies, behavioral finance principles, and digital client experience tools that are transforming how financial services firms interact with their customers. From onboarding to portfolio reviews, every touchpoint is an opportunity to exceed expectations and retain high-value clients.

Objectives

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

- Apply client segmentation and profiling to deliver personalized service
- Enhance communication skills for relationship building and client retention
- Manage client expectations through proactive engagement and value delivery
- Utilize CRM systems and analytics for relationship development
- Handle difficult client scenarios and complaints professionally

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Why Attend

- Strengthen your ability to retain and grow client accounts
- Learn how to build high-impact, trust-based client relationships
- Master the art of managing client expectations and conflict resolution
- Improve productivity with CRM tools and data-driven insights
- Differentiate your service offering in a crowded financial marketplace

Target Audience

This program is designed for:

- Relationship Managers and Client Advisors
- Financial Planners and Private Bankers
- Wealth Management and Investment Professionals
- Customer Experience and Business Development Managers
- CRM System Users and Sales Enablement Professionals

Individual Benefits

Key competencies that will be developed include:

- Improved interpersonal and communication skills
- Enhanced ability to manage client portfolios strategically
- Greater confidence in dealing with client objections and concerns
- Fluency with CRM tools and customer journey mapping
- Stronger emotional intelligence and active listening capabilities

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved client retention and referral rates
- Stronger brand loyalty and trust in client interactions
- More effective cross-selling and upselling outcomes
- Consistent delivery of high-quality service standards
- Greater efficiency through CRM utilization and client segmentation

Instructional Methodology

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

- Strategy Briefings – Explore CRM frameworks, KPIs, and lifecycle strategies in finance
- Case Studies – Real-life client relationship successes and failures in financial services
- Workshops – Role plays and simulations of client meetings, onboarding, and reviews
- Peer Exchange – Group discussions on managing difficult clients and driving engagement
- Tools – CRM dashboards, communication templates, and client feedback surveys
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Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable)

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 Client Relationship Management

- Module 1: Role of CRM in Financial Services (07:30 – 09:30)
- Importance of client relationships in financial performance
- Relationship lifecycle and client journey
- Trust, loyalty, and value creation in advisory services
- Module 2: Client Segmentation & Profiling (09:45 – 11:15)
- Needs-based segmentation models
- Behavioral finance and client personas
- Identifying service gaps and expectations
- Module 3: Emotional Intelligence & Communication (11:30 – 01:00)
- Listening skills and empathy in client conversations
- Adapting communication styles
- Managing difficult conversations and defusing conflict

Day 2: Strategic Engagement & Relationship Building

- Module 1: Client Onboarding & First Impressions (07:30 – 09:30)
- Designing high-impact onboarding experiences
- Setting service expectations early
- Compliance and documentation essentials
- Module 2: Building Trust-Based Relationships (09:45 – 11:15)
- The psychology of trust and credibility
- Transparency and value delivery over time
- Trust-destroyers to avoid in financial settings
- Module 3: Enhancing Long-Term Loyalty (11:30 – 01:00)
- Client advocacy and referral triggers
- Client appreciation strategies
- Proactive vs. reactive service techniques

Day 3: Tools, Technology & CRM Systems

- Module 1: CRM Tools & Dashboards (07:30 – 09:30)
- Overview of popular CRM systems in finance
- Customizing dashboards for daily client tracking
- Activity tracking and follow-up automation
- Module 2: Data-Driven Relationship Development (09:45 – 11:15)
- Using data to personalize client interactions
- Predictive analytics in client retention
- Leveraging AI and automation in CRM
- Module 3: Feedback & Continuous Improvement (11:30 – 01:00)
- Surveys, net promoter scores (NPS), and client feedback loops
- Using complaints and feedback for service innovation
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Measuring satisfaction, loyalty, and experience

Day 4: Advanced Practices in Client Management

- Module 1: Key Account & High-Net-Worth Client Strategies (07:30 – 09:30)
- Tailored service for top-tier clients
- Portfolio review and performance discussions
- Coordinating across teams for premium service delivery
- Module 2: Cross-Selling & Upselling Best Practices (09:45 – 11:15)
- Identifying opportunities without being intrusive
- Understanding client financial goals and gaps
- Ethical selling in regulated environments
- Module 3: Digital Relationship Management (11:30 – 01:00)
- Using digital channels for client interaction
- Online meetings, messaging, and remote advisory
- Integrating hybrid communication into CRM strategy

Day 5: Integration, Simulation & Action Planning

- Module 1: Simulated Client Advisory Meetings (07:30 – 09:30)
- Role-play practice with client objections
- Delivering news (good and bad) with professionalism
- Practicing personalized advisory presentations
- Module 2: Service Recovery & Client Retention (09:45 – 11:15)
- Handling complaints and regaining client confidence
- Creating a service recovery framework
- Turning dissatisfied clients into loyal promoters
- Module 3: Strategic Action Planning (11:30 – 01:00)
- Creating a personal CRM development plan
- Setting client relationship goals and metrics
- Final review, feedback, and Q&A

Certification

Participants will receive a Certificate of Completion in Client Relationship Management in Financial Services, recognizing their mastery of client engagement strategies, communication techniques, and CRM best practices tailored to the financial services industry.

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**

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