

CORPORATE BANKING ESSENTIALS FOR RELATIONSHIP MANAGERS

“Equipping Frontline Bankers with Strategic Corporate Client Management Skills”

Schedule

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

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

Introduction

Corporate banking relationship managers are the frontline ambassadors of a financial institution, tasked with managing complex client portfolios and delivering tailored financial solutions. This intensive program is designed to empower bankers with the tools, techniques, and mindset required to serve corporate clients effectively, deepen relationships, and drive profitable growth while managing risk.

Participants will gain practical insights into corporate credit, cash management, trade finance, client onboarding, regulatory compliance, and strategic selling — all aligned with the current needs of the corporate banking landscape.

Objectives

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

- Understand the structure and services of corporate banking
- Assess corporate clients’ financial needs and offer suitable solutions
- Evaluate creditworthiness and structure loans appropriately
- Enhance relationship-building and client retention techniques
- Align product knowledge with the lifecycle of corporate clients

Why Attend

- Gain an end-to-end understanding of corporate banking services
- Improve confidence in engaging with senior corporate clients
- Develop commercial acumen and advisory capabilities
- Enhance your value as a trusted financial partner
- Strengthen credit and risk understanding for better decision-making

Target Audience

This program is designed for:

- Relationship Managers and Account Officers in corporate and commercial banking
- Corporate Lending and Credit Analysts
- Branch Managers and Business Development Executives
- Product Managers involved in corporate banking solutions
- New hires transitioning into the corporate banking division

Individual Benefits

Key competencies that will be developed include:

- Corporate credit assessment and loan structuring
- Client-centric communication and advisory techniques
- Financial and cash flow analysis for business clients
- Trade finance knowledge and treasury solution selling
- Effective onboarding, KYC, and compliance practices

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved client relationship management outcomes
- Higher profitability through appropriate product matching
- Enhanced portfolio quality through informed risk decisions
- Stronger cross-selling and client retention capabilities
- Reduced compliance risk in corporate account handling

Instructional Methodology

This interactive course will use a practical, blended methodology:

- Expert Lectures – Structured learning on core concepts and frameworks
- Live Simulations – Role-play scenarios of client meetings and negotiations
- Case Studies – Real-world examples from global and regional banks
- Group Workshops – Collaborative problem-solving on credit and product strategy
- Tools & Templates – Client assessment checklists and pitch preparation guides

MAWA EVENTS

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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: Corporate Banking Fundamentals & Client Understanding

- Module 1: Introduction to Corporate Banking (07:30 – 09:30)
 - Structure of corporate banking divisions
 - Key client segments and service expectations
 - Role and responsibilities of relationship managers
- Module 2: Understanding the Corporate Client (09:45 – 11:15)
 - Business models, ownership structures, and sectors
 - Client onboarding and KYC procedures
 - Needs-based segmentation
- Module 3: Relationship Management Lifecycle (11:30 – 01:00)
 - The client lifecycle and touchpoints
 - Developing trust and long-term value
 - Client review and portfolio management

Day 2: Credit Assessment & Loan Structuring

- Module 1: Corporate Financial Statement Analysis (07:30 – 09:30)
 - Key financial ratios and performance indicators
 - Liquidity, solvency, and profitability review
 - Cash flow analysis for debt repayment
- Module 2: Credit Risk Assessment (09:45 – 11:15)
 - Credit appraisal frameworks (5 Cs, CAMELS)
 - Risk rating models and sectoral considerations
 - Warning signs and credit deterioration
- Module 3: Structuring Corporate Loans (11:30 – 01:00)
 - Term loans, working capital, overdrafts, and syndicated facilities
 - Covenants and securities
 - Pricing, margins, and facility documentation

Day 3: Corporate Banking Products & Solutions

- Module 1: Cash Management Solutions (07:30 – 09:30)
 - Collections, disbursements, liquidity management
 - Payment solutions and digital channels
 - Treasury services integration
- Module 2: Trade Finance Overview (09:45 – 11:15)
 - Letters of credit, guarantees, and bills
 - Import/export financing
 - Risk mitigation in international trade
- Module 3: Treasury & Risk Management Products (11:30 – 01:00)
 - FX and interest rate hedging
 - Derivatives and structured products overview
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Matching solutions to client exposures

Day 4: Client Engagement & Strategic Selling

- Module 1: Sales Techniques for Relationship Managers (07:30 – 09:30)
- Preparing for client meetings
- Consultative selling and needs-based dialogue
- Managing objections and closing techniques
- Module 2: Cross-Selling and Wallet Share Maximization (09:45 – 11:15)
- Identifying opportunities across client lifecycle
- Product bundling and pricing tactics
- Internal collaboration with product teams
- Module 3: Enhancing Client Experience (11:30 – 01:00)
- Building service excellence frameworks
- Handling complaints and service recovery
- Leveraging feedback for continuous improvement

Day 5: Compliance, Monitoring & Growth Strategy

- Module 1: Regulatory Compliance in Corporate Banking (07:30 – 09:30)
- AML, sanctions, FATCA, and Basel requirements
- Regulatory reporting and audit readiness
- Ethics and responsible lending
- Module 2: Monitoring & Early Warning Systems (09:45 – 11:15)
- Portfolio monitoring techniques
- Triggers for review or escalation
- Stress testing and action planning
- Module 3: Relationship Manager as Strategic Partner (11:30 – 01:00)
- Becoming a trusted advisor to clients
- Value-added insights and sector knowledge
- Career development and professional conduct

Certification

Participants will receive a Certificate of Completion in Corporate Banking Essentials for Relationship Managers, validating their capabilities in managing corporate client portfolios, financial assessment, product advisory, and relationship strategy.

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.

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