MAWA EVENTS

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CORPORATE RELATIONSHIP MANAGEMENT IN FINANCIAL SERVICES

“Mastering Strategic Client Engagement and Portfolio Development for Financial Institutions”

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, effective corporate relationship management is vital for building long-term client trust, deepening wallet share, and creating tailored solutions that meet evolving client needs. This course equips professionals with the tools and techniques to manage high-value corporate relationships, foster strategic partnerships, and deliver exceptional service in financial institutions.

Participants will learn to manage portfolios proactively, navigate complex client structures, and align financial solutions with client goals, all while enhancing relationship profitability and minimizing risk.

Objectives

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

- Understand the dynamics of corporate client relationships in banking and finance
- Segment clients based on value and potential
- Build strategic account plans and deepen client engagement
- Align financial products and services with client needs
- Manage relationship risk while enhancing value delivery

Why Attend

- Learn practical strategies to grow and retain key corporate accounts
- Build confidence in navigating complex client relationships
- Gain tools for structuring win-win solutions in financial engagements
- Understand how to manage risk without compromising service quality
- Strengthen your role as a trusted advisor in financial services

Target Audience

This program is designed for:

- Corporate relationship managers and key account officers
- Client service and business development professionals in financial services
- Mid- to senior-level banking staff working with corporate clients
- Treasury and trade finance professionals engaging with corporates

Individual Benefits

Key competencies that will be developed include:

- Client segmentation and account planning
- Consultative selling and solution design
- Relationship profitability analysis
- Risk-sensitive client engagement
- Strategic communication and trust-building

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased client retention and revenue growth
- Stronger alignment between client needs and service delivery
- More strategic and risk-informed client management
- Improved teamwork between front-line staff and internal stakeholders

Instructional Methodology

This program follows a practical, business-focused learning approach:

- Strategy Briefings – Best practices in relationship management and financial services strategy
- Case Studies – Real-life corporate engagement and account challenges
- Workshops – Development of strategic account plans and client solutions
- Peer Exchange – Experience-sharing across diverse financial roles
- Tools – Client profiling templates, CRM checklists, and opportunity management frameworks

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 Corporate Relationship Management

- Module 1: Understanding Corporate Client Behavior (07:30 – 09:30)
- Corporate client lifecycle and decision-making
- Key drivers of corporate banking relationships
- Corporate client types and financial needs
- Module 2: Role of Relationship Managers (09:45 – 11:15)
- Evolving expectations in financial relationship management
- Balancing advisory and sales roles
- Managing internal collaboration to serve clients
- Module 3: Building Trust and Credibility (11:30 – 01:00)
- First impressions and long-term trust-building
- Communication strategies that resonate with corporates
- Relationship psychology and behavioral insight

Day 2: Strategic Client Segmentation and Account Planning

- Module 1: Client Profiling and Segmentation (07:30 – 09:30)
- Segmenting by size, complexity, and potential
- Prioritizing resources for top clients
- Using data to support segmentation
- Module 2: Developing Account Plans (09:45 – 11:15)
- Elements of a strategic account plan
- Identifying opportunities and relationship goals
- Aligning with internal business objectives
- Module 3: Account Governance and Reviews (11:30 – 01:00)
- Periodic client reviews and feedback mechanisms
- Performance monitoring and benchmarking
- Escalation and service recovery strategies

Day 3: Designing and Delivering Financial Solutions

- Module 1: Understanding Client Needs (07:30 – 09:30)
- Consultative conversations and needs analysis
- Opportunity mapping and gap identification
- Tailoring solutions for business problems
- Module 2: Structuring and Presenting Financial Solutions (09:45 – 11:15)
- Packaging multi-product offerings
- Communicating value proposition effectively
- Internal coordination for solution delivery
- Module 3: Cross-Selling and Value Creation (11:30 – 01:00)
- Cross-sell strategies that support client goals
- Driving synergies across service lines
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Avoiding product-push fatigue

Day 4: Risk Awareness in Relationship Management

- Module 1: Managing Relationship Risk (07:30 – 09:30)
- Credit, operational, and reputational risks
- Early warning signs and risk mitigation
- Role of RM in maintaining risk standards
- Module 2: Regulatory and Compliance Considerations (09:45 – 11:15)
- AML, KYC, and onboarding compliance
- Client due diligence expectations
- Managing regulatory change impact on client relationships
- Module 3: Conflict Management and Problem Resolution (11:30 – 01:00)
- Handling difficult conversations professionally
- Conflict resolution frameworks
- Protecting relationships during service failures

Day 5: Enhancing Long-Term Relationship Value

- Module 1: Client Retention and Loyalty (07:30 – 09:30)
- Key drivers of loyalty in financial relationships
- Tracking client satisfaction and NPS
- Building advocacy through service excellence
- Module 2: Leveraging CRM Systems (09:45 – 11:15)
- Effective use of client relationship tools
- Capturing insights and managing pipelines
- Activity tracking and workflow efficiency
- Module 3: Strategic Relationship Planning (11:30 – 01:00)
- Building a multi-year relationship strategy
- Deepening wallet share and strategic influence
- Action planning and personal development

Certification

Participants will receive a Certificate of Completion in Corporate Relationship Management in Financial Services, recognizing their proficiency in managing complex corporate client portfolios, building strategic partnerships, and aligning financial solutions to corporate needs.

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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