MAWA EVENTS

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CROSS-SELLING GLOBAL MARKET PRODUCTS IN INSTITUTIONAL BANKING

"Maximizing Revenue and Client Value Through Integrated Product Strategies"

Schedule

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

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

Introduction

Cross-selling global market products—such as FX, derivatives, fixed income, and commodities—within institutional banking requires a sophisticated understanding of client profiles, market dynamics, and product interdependencies. This intensive course equips banking professionals with the strategies and tools to effectively identify, position, and deliver relevant product solutions that deepen relationships and maximize institutional client value.

Through practical exercises and real-world case studies, participants will learn to align client needs with product offerings, foster collaboration between relationship and product teams, and optimize the cross-sell process in compliance with regulatory standards.

Objectives

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

- Understand the value chain of global markets products in institutional banking
- Identify cross-selling opportunities across FX, fixed income, equity, and derivatives
- Present tailored solutions to meet client-specific goals and risk appetites
- Collaborate effectively with product specialists and internal stakeholders
- Ensure regulatory alignment and ethical conduct in all cross-selling activities

Why Attend

- Develop advanced techniques to drive cross-sell revenue in institutional accounts
- Enhance client engagement by offering integrated product strategies
- Strengthen your ability to align product solutions with complex client needs
- Stay ahead of compliance and suitability challenges in product marketing
- Gain confidence in pitching and structuring multi-product proposals

Target Audience

This program is designed for:

- Institutional Relationship Managers
- Corporate Banking Executives
- Capital Markets and Treasury Sales Teams
- Product Specialists in FX, Derivatives, and Fixed Income
- Client Advisors and Investment Consultants

Individual Benefits

Key competencies that will be developed include:

- Opportunity spotting and client profiling
- Product bundling and solution design
- Effective sales communication and persuasion
- Understanding of global market instruments and their applications
- Confidence in handling objections and closing cross-sell deals

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased product penetration and wallet share from institutional clients
- Enhanced internal collaboration between relationship and product teams
- Stronger compliance and governance in product sales
- Better alignment of product offerings with client strategies and objectives
- Improved revenue generation through holistic client coverage

Instructional Methodology

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

- Strategy Briefings – Overview of global market product suites and institutional needs
- Case Studies – Real-world scenarios of successful product bundling and execution
- Workshops – Interactive sessions on designing and pitching product combinations
- Peer Exchange – Group discussions on overcoming cross-selling challenges
- Tools – Checklists, pitch templates, client mapping 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 Cross-Selling in Institutional Banking

- Module 1: Institutional Banking Landscape & Client Segmentation (07:30 – 09:30)
- Overview of institutional client types and value drivers
- Mapping client needs to banking solutions
- Understanding the institutional sales cycle
- Module 2: Introduction to Global Market Products (09:45 – 11:15)
- FX, fixed income, equity-linked, and derivative products
- Key features, risks, and return profiles
- Current trends and opportunities
- Module 3: The Cross-Sell Mindset (11:30 – 01:00)
- Cross-selling vs. up-selling: key distinctions
- Building trust and relationship depth
- Compliance and ethical considerations

Day 2: Cross-Selling Strategies and Execution

- Module 4: Opportunity Identification Techniques (07:30 – 09:30)
- Client portfolio analysis
- Product suitability and timing
- Leveraging CRM tools
- Module 5: Structuring and Bundling Products (09:45 – 11:15)
- Creating value through combined offerings
- Case examples of FX + derivatives bundling
- Profitability and pricing considerations
- Module 6: Internal Alignment and Collaboration (11:30 – 01:00)
- Coordinating with product and risk teams
- Managing approval workflows
- Overcoming internal silos

Day 3: Client Engagement and Pitching Techniques

- Module 7: Consultative Selling and Solutioning (07:30 – 09:30)
- Asking the right questions
- Listening for latent needs
- Solution mapping frameworks
- Module 8: Effective Client Presentations (09:45 – 11:15)
- Presenting complex products with clarity
- Customizing proposals and demos
- Using storytelling in institutional pitches
- Module 9: Handling Objections and Negotiation (11:30 – 01:00)
- Navigating client concerns
- Techniques for closing deals
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Managing post-sale expectations

Day 4: Risk, Compliance and Regulation

- Module 10: Regulatory Landscape in Product Sales (07:30 – 09:30)
- Suitability and appropriateness frameworks
- Regional regulations: MiFID II, Dodd-Frank, Basel III
- Role of documentation and disclosures
- Module 11: Internal Controls and Governance (09:45 – 11:15)
- Risk limits, approvals, and escalation
- Conduct risk and conflict management
- Three lines of defense
- Module 12: Managing Reputational Risk (11:30 – 01:00)
- Lessons from enforcement actions
- Building a culture of responsible selling
- Client trust as a strategic asset

Day 5: Simulation and Real-World Application

- Module 13: Product Simulation & Role Play (07:30 – 09:30)
- Participants apply cross-sell strategies in simulated client meetings
- Case-based pitching exercises
- Peer and instructor feedback
- Module 14: Group Presentation of Solutions (09:45 – 11:15)
- Team project: bundling products for a mock client
- Justifying value and strategy
- Module 15: Course Wrap-Up and Key Takeaways (11:30 – 01:00)
- Key insights summary
- Personal action plan development
- Open Q&A and evaluation

Certification

Participants will receive a Certificate of Completion in Cross-Selling Global Market Products in Institutional Banking, validating their expertise in delivering integrated financial solutions tailored to institutional 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	TEL:	EMAIL:
Interested in running this course for your team? Please contact us:	**+601116373203**	**info@mawaevents.net**