MAWA EVENTS

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CROSS-SELLING GLOBAL MARKETS SOLUTIONS TO CORPORATE BANKING

“Strategic Advisory for Treasury, Risk & Investment Needs”

Schedule

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

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

Introduction

Corporate banking clients increasingly require complex financial solutions to manage risk, optimize liquidity, and achieve strategic growth. This program empowers relationship managers and product advisors to effectively cross-sell global markets solutions—including FX, interest rates, commodities, and structured products—to corporate clients. Participants will learn how to align treasury and financing needs with the right mix of market-based instruments and advisory techniques to create long-term, profitable client relationships.

Objectives

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

- Identify treasury and market exposure pain points in corporate clients
- Match global market solutions to client-specific funding, hedging, and investment goals
- Communicate product value in business terms with clarity and confidence
- Navigate client suitability, pricing structures, and documentation requirements
- Build integrated solutions across FX, rates, and derivatives desks

Why Attend

- Learn practical frameworks to cross-sell high-value treasury products
- Strengthen your corporate banking offering through market integration
- Translate financial exposures into risk solutions using real-world cases
- Improve collaboration with trading and structuring desks
- Build stronger, more profitable relationships with corporate clients

Target Audience

This program is designed for:

- Corporate Relationship Managers
- Treasury Sales and Product Officers
- Global Markets Product Advisors
- Corporate Client Advisors & Associates
- Institutional Banking Professionals

Individual Benefits

Key competencies that will be developed include:

- Enhanced product and advisory confidence
- Increased ability to identify and propose integrated solutions
- Improved client engagement using market insight and analysis
- Stronger collaboration across bank units to support client needs
- Capability to manage long-term solution-based relationships

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Higher product penetration in corporate client portfolios
- Enhanced risk management and advisory revenue streams
- Stronger cross-functional teamwork between corporate and markets teams
- Greater client retention due to improved relationship depth
- Scalable solutions and replicable client success frameworks

Instructional Methodology

The course incorporates:

- Live Case Studies – Treasury and market exposure scenarios
- Role-Play & Simulation – Product pitch practice
- Solution Workshops – Building integrated treasury proposals
- Facilitator Insights – Real market examples and failures
- Peer Learning – Collaborative exercises and team-based tasks

Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable)

Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Breaks: 09:30 & 11:15 | Lunch: 01:00 – 02:00

Day 1: Understanding Corporate Client Needs

- Module 1: Corporate Treasury Functions & Priorities (07:30 – 09:30)
- Overview of treasury operations and key exposures
- Working capital, FX risk, interest rate risk, and commodity price risk
- Client segmentation and business triggers
- Module 2: Global Markets Product Landscape (09:45 – 11:15)
- FX, money market, derivatives, structured notes, and repo products
- Common use cases and product objectives
- Product mapping to business strategies
- Module 3: Corporate Banker vs. Markets Advisor Role (11:30 – 01:00)
- Advisory collaboration across front-office teams
- Case-based discussion: Treasury and RM alignment
- Product neutrality and client-first mindset

Day 2: FX, Rates & Derivatives Solutions

- Module 4: FX Risk Identification & Solutioning (07:30 – 09:30)
- Types of FX exposures: transactional, translational, and economic
- Spot, forward, swap, and option strategies
- Case exercise: FX proposal for importer/exporter
- Module 5: Interest Rate & Yield Curve Advisory (09:45 – 11:15)
- LIBOR/SOFR transition and hedging alternatives
- IRS, FRA, and structured IR products
- Building rate hedge strategy with duration management
- Module 6: Commodity Price Hedging for Corporates (11:30 – 01:00)
- Oil, metals, and agricultural exposure mitigation
- Commodity forwards and swaps
- Sector-specific advisory: airlines, agriculture, and industrials

Day 3: Structuring Client-Centric Proposals

- Module 7: Diagnostic Questioning & Needs Analysis (07:30 – 09:30)
- Asking the right questions to reveal market exposures
- Understanding treasury risk appetite
- Cross-sell identification techniques
- Module 8: Solution Packaging and Presentation (09:45 – 11:15)
- Structuring pitch decks for corporate decision-makers
- Financial and risk benefit articulation
- Price, documentation, and execution transparency
- Module 9: Compliance, Suitability & Internal Risk (11:30 – 01:00)
- Product suitability frameworks
- Internal approvals and documentation
- Sales conduct and conflict of interest management

Day 4: Pitching, Objection Handling & Execution

- Module 10: Consultative Selling for Global Market Solutions (07:30 – 09:30)
- Building rapport and trust with corporate clients
- Aligning product language with CFO priorities
- Managing post-sale service and value delivery
- Module 11: Objection Handling & Deal Structuring (09:45 – 11:15)
- Objections around complexity, price, and need
- Managing trade-offs and emphasizing solution value
- Live case: Overcoming CFO resistance to FX hedge
- Module 12: Execution and Post-Trade Collaboration (11:30 – 01:00)
- Working with trading, operations, and documentation teams
- Monitoring product performance and exposure outcomes
- Institutionalizing success for future engagements

Day 5: Simulations, Application & Wrap-Up

- Module 13: Client Pitch Simulation (07:30 – 09:30)
- Live role-play with simulated corporate client
- FX, interest rate, and structured solution advisory
- Peer and trainer feedback
- Module 14: Proposal Finalization & Group Presentations (09:45 – 11:15)
- Group-based product proposals
- Collaborative critique and final learning capture
- Module 15: Key Takeaways & Certification (11:30 – 01:00)
- Review of learning outcomes
- Personal action planning for workplace application
- Course certificate ceremony

Certification

Participants will receive a Certificate of Completion in Cross-Selling Global Markets Solutions to Corporate Banking, validating their ability to deliver strategic product advisory and implement market-based solutions for corporate 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 Interested in running this course for your team? Please contact us:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**