



2-Day Intensive Course

Advanced Relationship Management *For Private Bankers*

Who's attending?

This course is beneficial to:

- Corporate relationship managers
- Private wealth managers
- Customer service managers
- Corporate Dealers
- Anyone who handles client relationships

Why not recommend this course to a colleague?

Intermediate/Advanced Level

12 – 13 April 2012, Singapore

The key to differentiating the bank from the competition is to see the customer's financial strategy from the customer's perspective - seeing their finances the way the customer sees it, not the way the Bank sees it from just a product perspective. This requires getting "inside the heads" of the customers and trying to understand at a deeper level what the key wealth management issues are that keep them awake at night. The trick is to look behind the financial and banking issues to understand what strategies they are trying to pursue and what obstacles are in the way of their getting where they want to go.

The focus of this course is on how to build long-term, profitable relationships with individual target accounts by differentiating the Bank from its competitors.

"The materials and topics covered are very practical and address the day-to-day issues we are facing."

What will I get out of it?

On completion of the workshop, a participant will be able to:

- Develop skills for better understanding of themselves and their clients
- Earn strategic account planning and effective selling skills
- Make high quality calls through effective communication and phone selling skills to effectively persuade customers through a professional, relationship-oriented sales approach

BOOK NOW! Register before 12 March 2012 for early-bird discount.

Venue

All of our courses are held in 4 -5 stars hotels, chosen for their location, facilities, and level of service. You can be assured of a comfortable, convenient learning environment throughout the duration of the course.

Due to the variation in delegate numbers, we will send confirmation of the venue to you approximately 2 weeks before the start of the course.

About Us

Salmon Thrust provides tailored financial training solutions to leading Asian clients. Being Asian for Asians, we understand that different cultures have their own needs in terms of product and knowledge, and in terms of their approach to Client Management.

Founded in 2004 to satisfy the demand for wealth management and related training programs in this part of the world, we develop and present seminars and workshops for executives working in corporations, investment banks, securities houses, firms of accountants and legal practices.

Our courses are held on a public or in-house basis, a full list of which can be found on our website. Visit www.salmonthrust.com

Funding Support

The Monetary Authority of Singapore (MAS) administers Financial Training Scheme (FTS) grants to financial sector organisations that sponsor eligible Singapore based participants to training programmes that meet qualifying criteria. For more details, please visit www.mas.gov.sg, or contact the MAS via fsdf@mas.gov.sg.

Steven Lesser

Steve has been in training and consultancy since 1991 and he travels a lot to Asia Pacific region. His practice is largely in the areas of Strategic Management, Change Implementation, Marketing and Sales, People Development, Negotiation, Problem Solving, Credit and Project Management. He has had extensive experience in the financial services industry. Clients include Vodafone, Citibank, Renong Berhad, AMP Banking. He has also had articles published in this area. Recent implementations include the installation and use of just-in-time electronic support tools for high leverage competencies, utilising Intranet & multimedia. Steve is also a frequent speaker at regional, HRD, financial and strategic conferences as well as facilitating client strategic planning, conferences and meetings.

Steve brings some 22 years financial services industry experience, from positions as General Manager Corporate Banking, The Nippon Credit Bank; Deputy State Manager, Challenge Bank Limited, and various managerial positions with the Commonwealth Bank of Australia.

COURSE CONTENT

Establishing Value

- Setting the stage and developing customer interest (especially outbound calls)
- Earning the right to build rapport

Question and Listen to Understand the Customer Situation

- Identifying overall business issues
- Determining business implications
- Identifying the impact on operations
- Determining financial implications

Define Alternative Solutions

- Assessing needs
- Brainstorming solutions
- Evaluating fit of solutions to needs and recognising other possible needs
- Shaping best solution with customer

Explore Concerns

- Clarifying and understanding concerns
- Offsetting concerns

Present Solutions and Obtain Commitment

- Explaining financial solutions and benefits
- Defining business problems solved
- Quantifying impact on business results
- Closing and setting implementation steps

Follow-Up

- Follow through after implementation and plan next strategic steps in the relationship

Strategic Negotiating

- Negotiate more strategically by looking at the whole relationship
- Use each negotiation interaction to build long-term business partnerships
- Get better deals consistently over the long-term
- Change the whole context of negotiating to one where both parties are sitting on the same side of the table working together *to help each other win*
- Anticipate negotiating tactics and diffuse them to preserve the relationship
- Use tactics in an appropriate way to move stalled negotiations along
- Deal more effectively with deadlocks and stalemates
- Use a more thorough and disciplined approach consistently to analyse negotiations situations and prepare effectively

Cases and role plays throughout the whole program will cover calls with both prospects and customers. Role plays will be short and focused, similar to phone calls and some in-person calls. Case studies will be discussed in groups.

Save time and money with in-house training

In-house training is an efficient and cost effective way to ensure that your employees are equipped with the knowledge and skills needed to make a real impact in your organization.

Training can be arranged for anything from small groups to entire divisions and will take place at a time chosen and convenient to you.

For more information on holding this, or any other salmon Thrust course in-house, please contact:

Audrey Ang, Sales Manager
Tel: +65 6323 0768
Email: audrey@salmonthrust.com

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Website
www.salmonthrust.com

Telephone
(+65) 6323 0768

Email
email@salmonthrust.com

Advanced Relationship Management for Private Bankers

12 – 13 April 2012, Singapore

Register now

Package	Before 12 Mar 2012	After 12 Mar 2012	Quantity	Sub-total
Registration fee	S\$1,800 Save \$200	S\$2,000		
Platinum Package	Send 4 attendees and 5 th comes FREE			

Attendee details

1	Name.....	Job title.....
	Tel.....	Email.....
2	Name.....	Job title.....
	Tel.....	Email.....
3	Name.....	Job title.....
	Tel.....	Email.....
4	Name.....	Job title.....
	Tel.....	Email.....
5	Name..... FREE	Job title..... FREE
	Tel..... FREE	Email..... FREE

Company/Invoicing details

Organization name.....

Address.....

Postcode.....

Invoice attention to..... Job title.....

Tel..... Email.....

Approving Manager signature

NB: Signatory must be authorized to sign on behalf of contracting organization

Name.....

Email..... Job title.....

Tel..... Fax.....

Authorizing signature * (Mandatory).....

Payment method

For payment by crossed **cheque or bank-draft**, please make payable to: **Salmon Thrust Pte Ltd**

For payment via **telegraphic transfer**, please make payment to:

Account number: 501-747323-001
 Account name: Salmon Thrust Pte Ltd
 Bank address: 65 Chulia Street, #01-01 OCBC Centre. Singapore 049513
 Bank code: 7339
 Swift code: OCBCSGSG

How to book your course

Complete this form and **fax** to:
+65 6423 9802

Or send the form to:

Salmon Thrust Pte Ltd
 55 Market Street #10-00
 Singapore 048941

Take the Platinum package

Get your team together and save!
Send 4 attendees and 5th comes free

You may also be interested in

- **Alternative Investments for Private Clients - Structured Products & Hedge Funds (22 – 23 Mar 2012)**
- **Behavioural Finance & Wealth Management (29 – 30 Mar 2012)**
- **Consultative Selling & Portfolio Structuring for Private Wealth Manager (23 – 24 Apr 2012)**
- **Essential Fundamentals & Technical Knowledge for Private Wealth Managers (14 -15 May 2012)**
- **Structured Products in Wealth Management (7 – 8 Jun 2012)**
- **Technical Analysis for Trading & Advisory (10 – 11 May 2012)**

Go to www.salmonthrust.com to view our full course calendar

Terms and conditions

1. Should you be unable to attend, a substitute delegate is welcome at no extra charge.
2. Salmon Thrust does not provide refunds for cancellations. Invoiced sums are payable in full within 7 days of the invoice date.
3. Salmon Thrust will provide full course documentation to a delegate who has paid, but is unable to attend.
4. Salmon Thrust reserves the right to change the content of the program without notice including the substitution, alteration or cancellation of speakers and/or topics and/or the alteration of the dates of the event.
5. Salmon Thrust is not responsible for any loss or damage as a result of a substitution, alteration, postponement or cancellation of an event under any circumstances.
6. Salmon Thrust reserves the right to amend any part of the published program, agenda or speakers due to factors outside of its control.

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