Formulate Innovative Strategies to Improve Client Relationships & Maximize Their Wealth

1 Day

LEVEL

Intermediate

WHAT WILL I GET OUT OF IT?

- Learn innovative steps to improve and build sustainable long term relationship with clients.
- Develop anticipatory and adaptive steps to enhance client relationship and solicit more vital client information.
- Improve personal influence competency.
- Adapt Value Management strategy in wealth management consultation.

COURSE CONTENT

Relationship as a Catalyst for Growth and Success

- Identifying relationship-building processes
- Connecting in 90 seconds
- The power of pacing and leading the client
    - Learn to speak confidently and compellingly to clients about investments and their individual portfolios, and to build solid, lasting relationships with investment clients.

Case Study: Identifying Client Types

Assessing Your Strategies in Client Relationship Building

- Identify your personal influence style
- Relationship between Influence and Persuasion
    - How can you be assertive positively? – Techniques for positive assertion-behavior.
- The consultative process
- Repairing a relationship

EQ Assessment

Relationship & Maximizing Wealth

- Understand the total wealth picture of clients and how to use relevant information
- Growing business in a competitive and volatile market

Adapting the 5Cs of Value Management

- Concept
- Communication
- Common Perception
- Consensus

- Commitment

Factors Important to Clients:

- The Real Purpose of Funds - Effects
- Time Horizon
- Risk Tolerance
- Liquidity Needs
  - S.C.O.R.E. Model to verify client factors.