



PRIVATE BANKING BUSINESS ENVIRONMENT ANALYSIS

IBF Standards – Private Banking and Wealth Management

8 IBF-STTS TRAINING HOURS

For registration of public scheduled session, [click here](#).
To organize a tailored session for your organization, please contact us at email@salmonthrust.com

This course will provide you a framework to analyse your business as a relationship manager and direct your efforts towards areas with the optimal return. The course focuses on understanding the influence of external and internal factors on the critical business functions of a relationship manager, analyse the factors and develop strategies related to the marketing, operational, and financial aspects of their business.

The skills gained include how to analyse data pertaining to the business landscape and environment, including competitor-analysis, global and local trends and developments that impact your business. At the end of the course, participants should be able to conduct basic business research, which includes the analysis of local and global market trends in order to identify opportunities and threats to their business. Using a structured approach, they will get to understand what are the major trends that have the highest impact on their business in the coming years. Participants will then identify key competitors' positioning and what marketing strategies they should adopt. To fully understand the impact of the marketing strategies on the return on investment, participants will then conduct basic financial analysis and forecast. Finally these findings and its implications will be communicated to stakeholders through proposed business plans and strategies. Emphasis will be placed on identifying and analysing key trends that will have a major impact on your market. Using this analysis, participants will formulate actionable marketing strategies for their own business.

TARGET AUDIENCE

- Relationship Managers with at least 3 years of working experience in Private Banking

LEARNING OUTCOMES

- Understand the microeconomic and macroeconomic principles that drive the economy
- Identify and understand various analytical techniques appropriate for environment analysis
- Identify the key metrics to drive desired outcomes
- Understand how to evaluate the industry competitive forces
- Understand the value proposition and business model
- Understand the market segment differentiator strategies
- Understand how to develop financial forecast based on marketing strategies
- Understand the impact of various risks on your strategies
- Identify and apply the various methods to calculate return on investment
- Understand how to develop a business plan

COURSE OUTLINE

Industry Analysis

- Understand some key economic factors that can impact your business
- Identify the stage of the industry
- Analyse the trends and forces impacting the wealth management industry
- Primary vs secondary research
- PESTLE framework
- Identify the key trends in the industry (Opportunities and Threats)

Market Analysis

- Porters 5 Forces Analysis
- Customer Analysis
 - Create personas of the market segments
 - Critical product and services criteria
 - Value proposition
 - Identify Critical Success Factors
- Competitor Analysis
 - Identify competitors' industry positioning and strategies

SWOT Analysis

- Identify and select optimal strategies

Business Plans / Strategies

- Marketing Plan
 - Marketing Objectives
 - Target market / Consumers
 - Marketing Strategies based on the analysis
 - Generic Strategies /4Ps / Ansoff Matrix
 - KPI – Measuring success
- Operational Plan
- Financial Plan
 - Financial Objectives
 - » Growth
 - » Margins
 - » ROA / ROI
 - Financial Forecasts
 - » Projections
 - » Assumptions
 - » KPI – Measuring success

Risks Assessment

- Impact and Probability Risk assessment
- Mitigating measures

Assessment - MCQ

(Please prepare a calculator for your assessment.)



IBF STANDARDS

This course is designed to meet the following Technical Skills & Competencies (TSC) in Skills Framework for Financial Services:



This programme has been accredited by The Institute of Banking and Finance (IBF) under the IBF Standards.

Industry Segment : Private Banking and Wealth Management
Job Role : Relationship Manager

Technical Skills and Competencies (TSCs) and Proficiency Level
 E6. Business Environment Analysis - Level 4

IBF-STTS

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Standards Training Scheme (IBF-STTS), subject to all eligibility criteria being met. Candidates are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

Find out more on www.ibf.org.sg

ABOUT IBF CERTIFICATION

Participants are encouraged to access the [IBF MySkills Portfolio](#) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process [here](#).

ABOUT THE IBF STANDARDS

The IBF Standards are a set of competency standards for financial skills. These Standards are developed in partnership with industry leaders and provide a professional development and skills roadmap for financial sector practitioners to excel in their respective job roles. They currently cover 12 industry segments in the financial sector.

ABOUT THE INSTITUTE OF BANKING AND FINANCE SINGAPORE

The Institute of Banking and Finance Singapore (IBF) is the national accreditation and certification agency for financial industry competency in Singapore under the IBF Standards. Find out more on www.ibf.org.sg

ABOUT SALMON THRUST

Founded in 2004, Salmon Thrust is committed to delivering real-world banking and financial training to professionals working in banks, corporates, government agencies, and other financial institutions.

Based in Singapore, we offer our clients in the region a broad range of up-to-date financial topics, delivered via classroom training and e-learning. Our courses range from foundational programmes for new entrants, right through to the most complex and current topics in the industry.

At Salmon Thrust, we are attentive to our clients' diverse learning needs. We identify relevant courses to bridge the learning and skill gaps, empowering our clients to make better decisions and bring real value to both their customers and organisations.

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