

Managing Client Relationships

BOOST YOUR BUSINESS DEVELOPMENT, SALES, AND NEGOTIATION SKILLS



DURATION

25 - 28 hours



DELIVERY CHANNEL

eLearning



Sections:

- 1 Business Development Skills
- 2 Personal Effectiveness Skills
- 3 Sales and Negotiation Skills

COURSE OVERVIEW & BENEFITS

How do you drive more business from a loan portfolio filled with commoditized products? What does it take to become the trusted advisor to new clients in a competitive market? Credibility and a good rapport with clients are essential.

Managing Client Relationships is a comprehensive course designed for customer-facing commercial and corporate lenders who want to optimize their business development skills and develop a self-aware, flexible communication style to better uncover and understand client needs. It also teaches sales and negotiation techniques that help lenders maintain control throughout the sales cycle.

As part of the course, participants complete the Lumina Spark® assessment, which helps them better understand the strengths of their communication style. They also learn the Lumina Spark® method of "speed reading" people, so that they can better gauge how clients perceive them and which aspects of their personality to showcase in which situations.

Throughout the course, participants create personalized action plans for performance improvement and learn how to apply new skills by completing interactive exercises, watching video demonstrations and familiarizing themselves with helpful job aids that they can continue to use post-training.

LEARNING OBJECTIVE

Learn proven best practices to strengthen your interpersonal, business development, sales, and negotiation skills so that you can grow your portfolio while maintaining client loyalty and satisfaction.

COMPETENCIES GAINED

Participants will be able to:

- Create a business development plan for winning new clients and deepening relationships with existing clients.
- Follow a structured process to build networks, approach prospective clients, and analyze their businesses.
- Adapt their communication style to strengthen their connections with all customers, including those whose communication style are different from their own.
- Actively listen and ask questions to better understand the client's perspective.
- Identify and apply the appropriate sales approach based on the client and the situation.
- Handle difficult situations and negotiations with greater confidence and control and make tactical choices to close the negotiation effectively.

TARGET AUDIENCE

Managing Client Relationships is suitable for commercial and corporate lenders and relationship managers, as well as commercial and corporate loan analysts and underwriters transitioning into a client-facing role.