



DURATION

25 - 30 hours



DELIVERY CHANNEL

eLearning



Course Modules:

- 1 The Small Business Environment
- 2 The Small Business Owner
- 3 Building Client Relationships
- 4 Enhancing Client Relationships
- 5 The Service Advantage

eLEARNING

Optimizing Relationships with Small Business Clients

STRENGTHEN SMALL BUSINESS RELATIONSHIPS BY UNDERSTANDING HOW BUSINESS OWNERS THINK

COURSE OVERVIEW & BENEFITS

The key to succeeding in the competitive, fast-paced small business lending landscape is to demonstrate superior communication and client-servicing skills, by truly understanding the operating environment and conditions that business owners face.

Optimizing Relationships with Small Business Clients (ORSBC) explores the attributes that determine industry attractiveness and the factors that contribute to growing and managing a successful small business. It teaches participants how to foster long-lasting relationships by understanding what motivates small business owners, how they process information, and how to communicate with them to understand their expectations.

Participants also learn how to fulfill their legal and ethical responsibilities as they provide expert advice to small business clients.

Armed with this knowledge, participants will be able to grow and strengthen their professional reputation with clients and within their organization and industry.

LEARNING OBJECTIVE

Develop essential relationship-building skills while broadening your understanding of small business owners, the factors that drive their success, and the challenges they face.

COMPETENCIES GAINED

Participants will be able to:

- Identify the traits of successful small businesses
- Recognize the characteristics and motivations of an entrepreneur
- Explain the lender's role in meeting the client's service expectations
- Communicate effectively with small business owners and develop strategies to handle difficult conversations
- Apply a needs-based approach to selling products and services and referring clients to other lines of business
- Explain their legal and ethical responsibilities as professionals in the financial services industry
- Create a service advantage for themselves and the financial institution by creating value for the client

TARGET AUDIENCE

ORSBC is suitable for anyone involved in the SME/small business lending process, including business lenders, relationship managers, loan officers, credit analysts, underwriters, branch managers and personal bankers who service or otherwise market to small and midsize businesses.

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COURSE DETAIL

Optimizing Relationships with Small Business Clients is divided into five modules, and comprised of a total of 15 lessons. At the end of each module, participants complete an assessment that challenges them to apply the concepts they've learned. As they complete the assessments, participants receive real-time feedback that prepares them for the final course exam.

| MODULES | | LESSONS |
|---|--------------------------------|--|
| 1 | The Small Business Environment | 1 The Small Business Market |
| | | 2 Market Segmentation |
| | | 3 Opportunitieess |
| | | 4 Challenges |
| 2 | The Small Business Owner | 5 Understanding the Entrepreneur |
| | | 6 Counselling an Entrepreneur |
| 3 | Building Client Relationships | 7 Aspects of Relationship-building |
| | | 8 Communicating Effectively |
| | | 9 Networking |
| | | 10 Interviewing the Client |
| | | 11 Managing Conflicts |
| 4 | Enhancing Client Relationships | 12 Relationship Selling |
| | | 13 Needs-Based Selling |
| 5 | The Service Advantage | 14 The Service Advantage |
| | | 15 Building Trust and Credibility |
| Optimizing Relationships with Small Business Clients Exam | | The course concludes with an online exam to assess concept mastery and mark course completion. |

This course is on the path to the Moody's Certificate in Small Business Banking (CSBB).

