

Advanced Relationship Management – Private Banking

Who we are

Mieza Consulting Pty Ltd is an Australian-based professional services firm specialising in building and sustaining organisational capability. With offices in Melbourne, Singapore and Hong Kong, Mieza is recognised for its ability to design and deliver programs throughout the Asia-Pacific region.

Introduction

This 2-day course has been specifically designed for private bankers who manage private banking clients. Wealth management and private banking are amongst the fastest growing areas in financial services. The course is packed with best practice examples with emphasis placed on developing relationship management skills which enable private bankers to differentiate themselves, and their bank, in the marketplace. The aim is to ensure that participants are able to walk away with a practical toolkit for managing their client relationships.

Who should attend

- Private Bankers
- Senior Private Banking Executives
- Product Specialists – Tax, Estate Planning, Financial Planning
- Senior Relationship Managers
- Financial Planners
- Client Relationship Managers
- Business Development Managers
- Account Executives & Account Managers
- Consultants involved in selling to financial services companies

Pre-requisite(s)

Currently employed in, or prior knowledge of, private banking.

Sample Course Outline

Global Private Banking Trends

- Introduction to the global private banking industry and its key drivers
- Asian client trend analysis – What are the implications for Singaporean private bankers?

Private Banking Clients

- Key characteristics – Sophistication, advice, buying behaviour
- Understanding the client's wealth management agenda

Client Segmentation Strategies

- Traditional versus value-based segmentation
- Emerging growth segments
- How to identify and rank customer needs

Client Relationship Management

- Client acquisition strategies
- Client value propositions
- Identifying cross-selling opportunities
- Client retention strategies

Customer Relationship Management – Skills

Application Workshop

- Understanding client buying behaviour
- Understanding different client "types"
- Advanced Customer Relationship Management
- Case Study – Private Banking (various segments)

Course Summary & Conclusion

Contact details:

Mieza Consulting Pty Ltd

Aquavista Tower, Suite 1401, 401 Docklands Drive, Docklands, Victoria 3008, Australia. T: +61 3 9001 1335 F: +61 3 9001 1337 E: andrew@mieza.com.au W: www.mieza.com.au

MIEZA

