Developing relationship managers

01 Influencing people - effective listening
- Listening more than talking
- How to be an effective listener
- 5WH approach
- Four level listening model
- Barriers to effective listening
- Listening actively and showing genuine interest

Approach used: Live (either virtual or face-to-face) simulated meeting with a client

02 Influencing people - effective questioning
- Questioning effectively
- Types of question - impact, problem, implication
- Benefit, structuring your questions
- Being clear on the intent and purpose of your question
- Reflecting what you hear
- Gaining clarity
- Establishing credibility and building rapport

Approach used: Live (either virtual or face-to-face) simulated meeting with a client

03 Relationship development skills - managing client meetings
- Meeting skills - Opening the meeting
- When and how to get down to business
- Responding to cues - visual and audio
- Being flexible but still getting what you need
- Managing the middle of the meeting
- Closing the meeting and next steps

Approach used: Live (either virtual or face-to-face) simulated meeting with a client

04 Relationship development skills - communicating effectively
- Clarifying the message you want to communicate, structuring your communication
- Selecting the method for communication - email/telephone/digital/face-to-face
- Positioning your communication
- It's a little bit about the 'what', but a whole lot about the 'how'
- Taking visual and audio cues
- Assessing your customers preferred communication style - visual/audible/tactile

Approach used: Communicating with the client using a variety of mechanisms e.g. simulated client calls

05 Opportunity development skills - managing client meetings
- Relationship development skills
- Communicating effectively
- Being comfortable with the Finance Director
- Creating a partnership relationship and not that of a supplier
- Demonstrating empathy and respect to win the hearts and minds of the business

Approach used: Forum theatre demonstration of best practice relationship with senior management - how to really add value for the customer

06 Opportunity development skills - customer future needs analysis
- What are the future drivers of the industry?
- What is the vision for the business?
- How will the business evolve?
- What are the product needs for the future form of business?
- Recognising the issues facing the business congruently with the management team - being there when it counts
- Demonstrating deep understanding of the customer’s issues

Approach used: For a real client delegates are encouraged to map the business forward into a number of possible future outcomes and identify likely customer needs and possible bank solutions

07 Opportunity development skills - customer current needs analysis
- What are the industry drivers?
- What are the imperatives for the business?
- What are the current product opportunities and needs?
- Generating an opportunity to meet to discuss the value added analysis you have done

Approach used: For a real client apply a number of analytical tools to identify the key issues facing that business