

Relationship Management Workshop

Course Description

The Relationship Management Workshop is a 2-day, intermediate level course for Relationship Officers and others sustaining relationships with clients.

The aim of the workshop is to provide participants with an understanding of the nature and benefits of relationship management and need to deliver excellent customer service. Participants will also be given the opportunity to develop the key relationship management skills that need to be applied, in order to achieve customer service excellence in a financial services environment.

On completion of the workshop participants will understand how to identify and satisfy a range of different customer needs. They will also be able to apply a range of techniques in the workplace, in order to handle customer dissatisfaction with the service provided and to improve sales performance by cross selling.

The programme will be conducted in English and will incorporate group work, activities, case studies and delegate presentations.

The course trainer, Gary Davies MBA DipM MCIM is a highly respected consultant, author and examiner with over 30 years relationship management experience to share with participants. In addition to his consultancy and writing work, Gary regularly teaches communications, marketing and management-related subjects and works with leading financial institutions in the UK and worldwide, including within the GCC.

Who Should Attend

Relationship Officers and others sustaining relationships with clients.

Course Content

Day One

Session 1

- The nature and benefits of relationship management
- Transactions versus relationships
- The different levels of a customer relationship
- Understanding and managing customer expectations

This section includes an exploration of the nature and benefits of relationship management and the reasons behind the need for the shift from a transactional to a relationship ethos. The different levels of a customer relationship and how they can be achieved are discussed. The need to both understand and manage a range of different customer expectations is also highlighted.

Session 2

- Requirements for successful relationship management
- Achieving customer service excellence
- Identifying and fulfilling customer needs
- Developing customer relationships

This section explores the factors that contribute towards a successful relationship management approach and the achievement of customer service excellence. The importance of identifying and fulfilling a range of different customer needs is highlighted and the principles and techniques that can be applied in order to develop customer relationships are discussed.

Day Two

Session 3

- Relationships with stakeholders
- Communication skills
- Complaint handling
- Cross selling

In this section the importance of maintaining sound relationships with other appropriate stakeholders that can contribute to a successful customer relationship is discussed. The importance of applying appropriate communications skills and techniques is highlighted. Various other principles and techniques are also explored and demonstrated, including some techniques that can be used to handle complaints and to cross sell products and services.

Session 4

- Introduction to final practical relationship management group exercise
- Preparation of group exercise
- Presentation of group exercise
- Discussion of presentations
- Review, summary and close

This final section will consist of a series of presentations from workshop participants who will present their group relationship management exercise and demonstrate what they have learned and how they have applied the principles and techniques discussed in previous sessions. The group work will be discussed and any learning points will be emphasised before undertaking a final review and summary of the key issues.