MOODY'S ANALYTICS

COURSE OUTLINE:

Presenting Credit Assessments

1 day
8 CPE Credits

Overview

This one day course focuses on how to present a case in the most effective way to credit approvers. You will learn how best to structure and communicate your case to individuals and committees. The majority of time on this course is spent on presentations with coaching and feedback.

Learning Objectives

Upon completion of this seminar delegates will be able to:

- Understand the cognitive biases and social influences that impact credit decisions.
- Structure the way you communicate your case.
- Adapt your delivery style for different people and settings.
- Respond credibly and confidently to questions and challenges.
- Practice improving presentations through mock Credit Committee meetings

Who Should Attend

- Corporate and Commercial Bankers
- Credit Analysts

Program Level

Program Level: Intermediate

Delivery Method: 1 day group coaching session. Maximum 10 delegates.

Accreditation

Moody's Analytics is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

WHY MOODY'S ANALYTICS?

Current and Consultative

Our seminars are created and updated utilizing the extensive experience, skills and research of Moody's Analytics. For in-house training, we work with you to understand the distinct needs of your organization and design, implement, and track the performance of your learning programs from end-to-end, including skills assessment, program design, implementation, evaluation, and enhancement.

Comprehensive Coverage

We offer a broad set of technical and soft skills programs that can be combined and adapted to the needs of your staff. Our areas of expertise include banking, finance, sales negotiation and leadership development:

Unparalleled Expertise

Our training solutions leverage over a century of experience in risk assessment and the comprehensive tools, data, and analysis of Moody's Analytics to deliver timely, in-depth, and comprehensive knowledge. In delivery, our people make the difference – they combine deep experiences as financial practitioners, intellectual passion for the content, and superior academic credentials with a commitment to delivering outstanding quality.

Presenting Credit Assessments – Agenda

Session 1: Presenting Credit Cases

- Your role when presenting a case and your relationship with the credit approver(s).
- Cognitive and social influences that affect decision making.
- Different decision making processes in individuals vs committees.
- Message structure and framing.

Case Study Preparation

- Prepare your case to present to Credit Committee.
- Prepare to participate as Credit Committee members for two other cases.

Session 2: Mock Credit Committee

- You will participate in a mock credit committee where you will present your case. The presentation will be filmed.
- Feedback and coaching is given on your delivery style, message structure and responses to questions.
- You will take away a copy of your video to analyse further.

Session 3: Questions and Challenges

- The motivation of questions and challenges
- Responding to questions.
- Keeping control of the conversation.
- Handling challenges.

Session 4: Mock Credit Committee

- A series of mock credit committees continue as described above, with the learning points drawn out from the practical exercise.

CONTACT US

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