

COURSE OUTLINE:

Relationship Management Toolkit Module 1: Relationship Excellence

2 days
16 CPE Credits

Overview

This Foundation level course forms the springboard for the Relationship Management Toolkit program. It delivers practical and proven techniques that increase participants' ability to influence others and achieve the results they desire, as well as putting into context all of those relationships that have challenged them in the past, and providing tools to make them more workable in the future. Using a memorable and intuitive behavioral model, participants will gain better awareness of the strengths and weaknesses of their own communication style and be able to apply the same concept to understanding and influencing clients, colleagues and stakeholders, in order to get their messages across even more effectively and influence others more often and more easily. This course delivers essential input for future modules of the Relationship Management Toolkit Program.

Learning Objectives

Upon completion of this seminar participants will be able to:

- » Understand their own communication and working style and the preferences of others
- » Adapt their style to better communicate, respond to and influence others
- » Understand what is required to get results through people over whom they have no direct authority
- » Apply tools and techniques learned in scenarios that they will face in their client interactions

Program Level

Program Level: Foundation

Prerequisites: Completion of online Lumina Spark profile measuring each participant's preferred communication style and approach to achieving results. The profiles will be generated at an extra cost, details will be provided under the financial proposal.

Delivery Method: Classroom training. 2 days.

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.

Relationship Management Toolkit Module 1: Relationship Excellence – Agenda

DAY ONE

Session 1: Principles of Influencing

- » What are the competencies required for effective influencing?
- » What skills do you need to develop or refine?
- » Planning your approach: push vs pull influencing styles.

Session 2: Understanding self and others

- » Introduction to the Lumina Spark toolkit for influencing
- » Your personal Lumina Spark profile
- » Speed-reading other people's preferred styles

Session 3: Flexing your communication style

- » How to adjust your style to get the results you need
- » Communicating effectively through different channels (e.g. telephone, written, email, face-to-face)

DAY TWO

Session 4: Advanced influencing skills

- » Gathering information with powerful questioning techniques
- » Effective listening skills
- » Elegant responses to difficult questions

Session 5: Influencing without Authority

- » The 6 Principles of Influence
- » How they are used on us all the time, and how we can turn them to our advantage
- » 4 reasons why people do not always do what you want and what you can do about it

Session 6: Making Proposals

- » Proposal structure: linking your message to the listener's needs
- » Delivering your message effectively
- » Role play practice

Session 7: Flexing your communication style

- » Practical role plays with feedback and coaching from the facilitator.
- » Using your own scenarios, role play in trios, with one acting as observer. Coach each other on how you would do this differently to achieve greater success.

Tailor Any Seminar for Your Organization

Moody's Analytics offers customized training and eLearning solutions to help you maximize your training investment. Our hands-on approach benefits companies of all sizes and requirements – from those with just a few local employees to those with staff dispersed around the globe. Contact us to learn more and to work with one of our training consultants to design the right program for your organization.

Multiple Bookings

Special rates may be available for multiple seminar or group bookings. Please contact us for details.

Fees & Cancellations

The fee listed is per participant and includes refreshments, lunches and seminar materials. Seminar fees do not include tax, transportation or hotel accommodations. Payment must be received in full prior to the start of the seminar. Registrations may be cancelled in writing via letter or email at least 30 days before the first date of the training for a full refund. Cancellations received less than 30 days in advance are eligible for substitution with another seminar, but fees will not be refunded. We reserve the right to cancel or reschedule seminars at any time. For further information on our refund and complaint policy, please contact us.

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