MOODY'S ANALYTICS

eLearning Solutions

Managing Client Relationships

Stand out from the lending crowd and win more business

HOURS OF ONLINE STUDY:
25-30

How do you get more business out of an existing loan portfolio with a set of commoditized products? What does it take to become the trusted advisor to new clients in a highly competitive market? Your credibility is what matters. This Moody's Analytics course is designed to increase your credibility by improving your persuasive communication, sales strategy and negotiation skills to set you apart from the crowd.

Benefit from convenient and efficient blended learning

» The online portion of the course provides tools, methods and self-reflection exercises that will enable you to increase your self-awareness, develop a flexible communication style and maintain control throughout the sales cycle. In each section of the course, you will have a chance to create personalized and practical action plans for performance improvement.
» The follow-up classroom sessions will give you the opportunity to apply the tools and skills you learned online in realistic lending scenarios. The feedback you receive on your live performance will help you to progress with your personal action plans so that effective behaviours become automatic.

The *Managing Client Relationships* curriculum is **specifically designed for lending professionals** who want to provide superior servicing skills. Training is targeted to the role, which makes it easier and faster to adopt its principles. Upon completion of this course, lending professionals will be able to:

» Uncover and examine communication blind spots to avoid derailing client relationships
» Develop a range of interpersonal behavioural tools to handle clients who are experiencing difficulty
» Design and negotiate deals that work for the bank
» Set personal servicing standards to create more engaging client relationships
» Create wider opportunities through cross-selling and new client acquisition strategies

Additionally, this comprehensive course includes the dynamic Lumina Spark© assessment tool that enables lending professionals to understand their preferred communication style. They will also learn the Lumina Spark method of speed reading people, which will help them to communicate with their clients more effectively. Furthermore, these skills will help them to understand how clients perceive them and which aspects of their personality will be best brought to the fore.

TARGET AUDIENCE

This course is recommended for institutions and individuals who wish to develop exceptional interpersonal skills to complement their strong technical knowledge. It is specifically recommended for:

» Commercial and corporate lenders and relationship managers
» Commercial and corporate loan analysts and underwriters moving into a client-facing role
» Branch managers and select client-facing staff that market to and work with business clients
» Lenders who are working towards earning the Moody's Analytics certification in Commercial Lending

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COURSE MODULES

The *Managing Client Relationships* curriculum content is accessible over the Internet. It is presented in three modules comprising ten interactive lessons:

BUSINESS EFFECTIVENESS

» Business Development Strategy
» Client Relationship Management
» Ethics

PERSONAL EFFECTIVENESS

» Building Rapport
» Questioning and Listening
» Emotional Intelligence
» Intercultural Communication

SALES AND NEGOTIATION

» Sales Skills and Strategies
» Meeting Management
» Negotiation Strategies

COURSE COMPONENTS

Interactive Lessons → Lumina Spark Portrait → Video Clips → End of Module Assessments → Administrative Reporting Tools → Classroom Sessions

1 Interactive Lessons

Learners will study essential content, learn how it should be applied, and test their knowledge.

2 Lumina Spark Portrait

Learners will have a chance to create their own personality portrait using the Lumina Spark psychometric profile tool provided by Lumina Learning®.

3 Video Clips

Embedded throughout the online course are short video clips featuring a training expert who will explain and demonstrate the concepts taught.

4 End of Module Assessments

Learners will be challenged to apply their knowledge and demonstrate their mastery of the skills required in their role as lending professionals.

5 Administrative Reporting Tools

Sponsors of the course will monitor participation and assess performance as staff progress through the course. Access to the Lumina Spark profile results are excluded from the monitoring process.

6 Classroom Sessions

Classroom sessions are highly recommended but are an optional add-on to the eLearning. Two one-day sessions are available:

1. Client Meeting Skills
2. Negotiating with Clients

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