

eLearning Solutions

Optimizing Relationships with Small Business Clients

Skills to build credibility and trust

Healthy client relationships require that small business bankers have strong interpersonal skills. These skills are essential to developing trusted and valued relationships with small business owners. Moody's Analytics Optimizing Relationships with Small Business Clients (ORSB) course helps bankers develop essential relationship building skills. It not only broadens their understanding of small business owners, but also the challenges they face.

ORSB details how to determine industry attractiveness, and identify firms that are growing and have successful leaders. It teaches how to discern what motivates small business owners, how they process information, and how to communicate with them to understand their expectations. The course also provides guidance in the professional, legal, and ethical responsibilities bankers have as they deal with entrepreneurial clients.

TARGET AUDIENCE

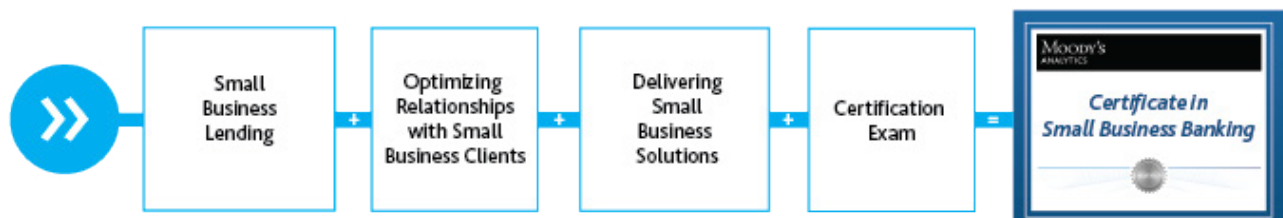
- » Small Business lenders and relationship managers
- » Small business loan analysts and underwriters
- » Branch Managers and Personal Bankers

LEARNING OUTCOMES WITH ORGANIZATIONAL BENEFITS

Upon completion of this course, bankers will be able to:

- » Understand the traits and success factors of sustainable small businesses
- » Outline the characteristics and motivations of an entrepreneur
- » Explain the banker's role in meeting the client's service expectations
- » Demonstrate effective communication behaviors and develop strategies to handle difficult clients
- » Apply a needs-based approach to selling products/services and developing bundling strategies
- » Explain their legal and ethical responsibilities as advisors in the financial industry
- » Create a service advantage for themselves and the bank by creating value for the client

This course is on the pathway to the Certificate in Small Business Banking "CSBB" certification



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MODULES AND LESSONS

THE SMALL BUSINESS ENVIRONMENT <ul style="list-style-type: none">» Overview of the Small Business Market» Market Segmentation» Opportunities» Challenges	RELATIONSHIP SELLING <ul style="list-style-type: none">» Relationship Selling» Selling Additional Solutions to Meet your Client's Financial Goals
THE SMALL BUSINESS OWNER <ul style="list-style-type: none">» Understanding the Entrepreneur» Counseling an Entrepreneur	THE SERVICE ADVANTAGE <ul style="list-style-type: none">» The Service Advantage» Building Trust and Credibility
BUILDING CLIENT RELATIONSHIPS <ul style="list-style-type: none">» Aspects of Relationship Building» Communicating Effectively» Networking» Interviewing the Client» Managing Conflicts	ONLINE EXAM <ul style="list-style-type: none">» The course concludes with an online exam (30 multiple-choice questions) to assess mastery of the concepts taught and indicate completion of the course.

This course can be accessed 24/7 and can be completed in 25 to 30 hours.

COMPREHENSIVE TURN-KEY SOLUTION

Moody's eLearning platform offers a cost-effective, scalable delivery solution for deploying training programs enterprise-wide via an interactive learning environment. Moody's platform supports AICC Proxy launch to deploy the training via the Bank's LMS, facilitating both learner access and records integration. In addition, we offer implementation and administration services as part of our eLearning turn-key experience.



Interactive Lessons:

- » Interactive Lessons
- » Knowledge checks & practice exercises



Assessments:

- » End of course exam to demonstrate mastery of the concepts



Administrative Tools:

- » Participation monitoring
- » Performance assessment

CONTACT US

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