

## Business Development Skills

IDENTIFYING AND NURTURING HIGH-VALUE LENDING RELATIONSHIPS



DURATION

7 hours



DELIVERY CHANNEL

eLearning



### Course Modules:

- 1 Business Development Strategy
- 2 Client Relationships Management
- 3 Ethics

### COURSE OVERVIEW & BENEFITS

In the competitive, fast-paced world of commercial lending, it can seem tempting—and sometimes even necessary—to focus all of your attention on your active opportunities. But the key to long-term success—and a robust pipeline—lies in careful planning, effective prospecting, and thoughtful relationship management.

Business Development Skills (BDS) is designed for commercial and corporate lenders and relationship managers who want to reenergize their approach to sales and fine-tune their ability to grow their portfolios strategically, efficiently, and ethically.

In this course, participants study essential skills—from developing a business plan and prioritizing tasks to identifying new clients and upsell opportunities—and learn how to apply them as they complete interactive exercises, observe video demonstrations, and familiarize themselves with helpful job aids that they can continue to use post-training.

Combined, these skills will help them lay the groundwork for a well-organized, forward-looking approach that translates into long-term success for them and their organization.

### LEARNING OBJECTIVE

Learn how to build a sound business development plan that will help you grow your commercial lending portfolio in a customer-centric, legally compliant, and ethical way.

### COMPETENCIES GAINED

#### Participants will be able to:

- Create a business development plan for winning new clients and deepening relationships with existing clients.
- Follow a structured process to build networks, approach prospective clients, and analyze their businesses.
- Recognize the types of ethical dilemmas that might arise and manage them in ways that build loyalty and trust.
- Understand their role in ensuring that the financial institution remains in compliance with applicable regulations.

### TARGET AUDIENCE

BDS is recommended for individuals seeking to build exceptional business development skills that complement their technical knowledge of lending, including commercial and corporate lenders and relationship managers, and commercial and corporate loan analysts and underwriters transitioning into client-facing roles.