MOODY'S ANALYTICS

eLEARNING

Managing Client Relationships

BE DISTINCT TO WIN MORE BUSINESS

DURATION

25 - 28 hours

DELIVERY CHANNEL

eLearning

Skills Application Labs Available

Sections:

1 Business Development Skills

2 Personal Effectiveness Skills

3 Sales and Negotiation Skills

COURSE OVERVIEW & BENEFITS

How do you drive more business from a loan portfolio filled with commoditized products? What does it take to become the trusted advisor to new clients in a competitive market? Credibility and a good rapport with clients are essential.

Managing Client Relationships (MCR) is a comprehensive course designed for customer-facing lenders who want to optimize their business development plans and develop a self-aware, flexible communication style to better uncover and understand client needs. It also teaches sales and negotiation techniques that help lenders maintain control throughout the sales cycle.

Throughout the course, participants create personalized action plans for performance improvement and learn how to apply new skills by completing interactive exercises, watching video demonstrations and familiarizing themselves with helpful job aids that they can continue to use post-training.

Training is targeted specifically to the client-facing lender's role, making it easier for participants to adopt the principles that will bolster their credibility and ability to provide superior servicing.

LEARNING OBJECTIVE

Learn proven best practices to strengthen your interpersonal, business development, sales and negotiation skills so that you can grow your portfolio while maintaining client loyalty and satisfaction.

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
- Adapt their communication style to strengthen their connections with others, particularly those whose styles or culture are different from their own
- Actively listen and ask questions to better understand the client's perspective
- Apply different approaches to selling and choose the right sales approach for different types of clients and situations
- Handle difficult situations and negotiations with greater confidence and control and make tactical choices to close the negotiation effectively

TARGET AUDIENCE

MCR is recommended for individuals seeking to build strong interpersonal 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.

Contact us for more information at: elearning@moodys.com

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COURSE DETAIL

As part of this course, participants complete the dynamic Lumina Spark© assessment, which helps them better understand the strengths of their communication style. They also learn the Lumina Spark© method of "speed reading" people, to better gauge how their clients perceive them and which aspects of their personality to showcase in which situations.

SECTIONS		MODULES	
1	**Business Development Skills**	1	Business Development Strategy
		2	Client Relationship Management
		3	Ethics
2	**Personal Effectiveness Skills**	4	Building Rapport
		5	Questioning and Listening
		6	Emotional Intelligence
		7	Intercultural Communication
3	**Sales and Negotiation Skills**	8	Sales Skills and Strategies
		9	Meeting Management
		10	Negotiation Strategies

SKILLS APPLICATION LABS

Two one-day instructor-led sessions are available and highly recommended:

1. Client Meeting Skills

2. Negotiating with Clients

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