QUEST TRAINING

Strategic Relationship Management in Banking

Corporate & Commercial Banking · Banking & Finance · 5 Days · Classroom

OVERVIEW

Strategic Relationship Management in Banking is a comprehensive professional training course designed to equip banking professionals with the knowledge, skills, and strategic capabilities required to build, manage, and strengthen long-term relationships with retail, corporate, commercial, institutional, and government clients. In today's highly competitive banking environment, relationship management has evolved beyond traditional customer service into a strategic function that drives customer loyalty, sustainable revenue growth, risk management, and competitive advantage.Đ
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This course provides participants with a comprehensive understanding of relationship management principles, customer segmentation, client lifecycle management, consultative selling, financial needs analysis, solution-based banking, customer value creation, account planning, portfolio management, and cross-functional collaboration. Participants will learn how to identify customer needs, develop customized banking solutions, enhance customer engagement, and create long-term partnerships that support both client success and institutional growth.Đ
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The program also explores the integration of Strategic Relationship Management with Corporate Banking, Retail Banking, Commercial Banking, Treasury Services, Wealth Management, Credit Risk Management, Customer Experience, Digital Banking, and Regulatory Compliance. Participants will examine advanced techniques for strategic account planning, stakeholder management, negotiation, communication, conflict resolution, customer profitability analysis, and performance measurement while maintaining strong governance and regulatory standards.Đ
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Through practical case studies, customer simulations, relationship planning workshops, negotiation exercises, and real-world banking scenarios, participants will strengthen their ability to manage key client relationships, improve customer retention, identify business development opportunities, increase wallet share, and support strategic business objectives. By the end of the course, participants will be equipped to implement relationship management strategies that enhance customer satisfaction, improve financial performance, strengthen institutional reputation, and contribute to sustainable banking growth.

OBJECTIVES

- Analyze Strategic Relationship Management principles and evaluate their role in achieving sustainable banking growth by the end of the course.
- Develop comprehensive relationship management strategies that strengthen customer engagement and long-term partnerships.
- Evaluate customer financial needs and recommend integrated banking products and financial solutions.
- Apply consultative selling techniques to improve relationship quality and business development

opportunities.
• Design strategic account plans that support customer retention, portfolio growth, and profitability.
• Improve stakeholder engagement, communication, negotiation, and conflict resolution skills within banking relationships.
• Strengthen governance by implementing customer due diligence, regulatory compliance, ethical banking practices, and relationship risk management.
• Implement Key Performance Indicators (KPIs), customer profitability measures, and relationship management metrics to evaluate performance.
• Assess emerging trends in digital banking, customer analytics, artificial intelligence, financial technology, and omnichannel customer engagement.
• Align Strategic Relationship Management with Corporate Banking, Retail Banking, Commercial Banking, Treasury Services, Credit Risk Management, and organizational strategic objectives before course completion.

WHO SHOULD ATTEND

This course is designed for Relationship Managers, Corporate Banking Managers, Commercial Banking Managers, Retail Banking Managers, Business Development Managers, Corporate Sales Managers, Key Account Managers, Treasury Relationship Managers, Wealth Management Advisors, Credit Managers, Customer Experience Managers, Client Service Managers, Product Managers, Financial Advisors, Banking Operations Managers, and professionals responsible for managing customer relationships within financial institutions.Đ
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The program is equally valuable for Chief Banking Officers, Heads of Corporate Banking, Heads of Retail Banking, Executive Management Teams, Business Unit Leaders, Treasury Executives, Government Banking Specialists, Public Sector Banking Professionals, Financial Institution Executives, Customer Strategy Leaders, Business Development Directors, FinTech Professionals, and decision-makers responsible for client relationship management, customer growth, strategic partnerships, and long-term business development.

LEARNING OUTCOMES

• By the end of this course, participants will be able to:
• Develop strategic relationship management plans for diverse banking customer segments.
• Evaluate customer financial needs and recommend integrated banking products and advisory solutions.
• Apply consultative selling, negotiation, and communication techniques to strengthen customer relationships.
• Design account development strategies that improve customer retention, profitability, and portfolio growth.
• Strengthen stakeholder engagement and effectively manage complex banking relationships.
• Implement customer due diligence, ethical banking standards, and regulatory compliance within relationship management activities.
• Prepare executive relationship reports using KPIs, customer profitability analysis, relationship scorecards, and portfolio performance indicators.
• Integrate Strategic Relationship Management with Corporate Banking, Commercial Banking, Treasury Services, Credit Risk Management, and Customer Experience strategies.
• Evaluate digital banking technologies, customer analytics, artificial intelligence, and financial technology solutions that enhance relationship management.

• Develop a practical implementation roadmap to strengthen customer engagement, improve relationship quality, increase cross-selling opportunities, optimize portfolio performance, enhance institutional reputation, and support sustainable banking growth.

COURSE OUTLINE

1. Course Outline:
2. Day 1: Foundations of Strategic Relationship Management
3. Foundations of Strategic Relationship Management
4. Evolution of relationship management in modern banking
5. Customer segmentation and relationship lifecycle
6. Strategic value of customer relationships
7. Understanding client financial needs
8. Practical application: Customer relationship assessment and segmentation
9. Day 2: Consultative Selling and Customer Solutions
10. Consultative Selling and Customer Solutions
11. Consultative selling methodologies
12. Financial needs analysis
13. Product positioning and solution-based banking
14. Cross-selling and up-selling strategies
15. Practical application: Designing integrated customer solutions
16. Day 3: Strategic Account Planning and Portfolio Management
17. Strategic Account Planning and Portfolio Management
18. Strategic account planning
19. Customer profitability analysis
20. Portfolio growth strategies
21. Stakeholder management and business development
22. Practical application: Developing strategic account management plans
23. Day 4: Governance, Communication, and Relationship Excellence
24. Governance, Communication, and Relationship Excellence
25. Negotiation and communication skills
26. Customer experience management
27. Regulatory compliance and customer due diligence
28. Managing relationship risks and conflict resolution
29. Practical application: Handling complex customer relationship scenarios
30. Day 5: Building High-Performance Banking Relationships
31. Building High-Performance Banking Relationships
32. International best practices in relationship management
33. Digital transformation and customer engagement technologies
34. Performance measurement using KPIs and relationship scorecards
35. Continuous improvement in customer relationship management
36. Final workshop: Developing a comprehensive Strategic Relationship Management implementation plan that includes customer segmentation, relationship strategy development, financial needs analysis, consultative selling, account planning, customer profitability management, stakeholder engagement, regulatory compliance, digital relationship tools, performance measurement, and continuous improvement initiatives to strengthen customer loyalty, enhance banking performance, increase business opportunities, and support sustainable organizational growth.

Register or Request More Information

Course page: http://localhost:3000/courses/strategic-relationship-management-in-banking
Website: http://localhost:3000
Email: info@example.com
Phone: +44 20 0000 0000