Relationship Management for Banks Training Course

Professional Development Training Course Outline

Category	Banking Institute	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Relationship Management for Banks Training Course is engineered to equip modern financial professionals with the AI-driven insights, digital-first engagement strategies, and hyper-personalized communication techniques required to foster deep, long-term client trust. By synthesizing human-centric emotional intelligence with advanced data analytics, participants will learn to anticipate client needs, mitigate risks, and drive sustainable revenue growth in an increasingly competitive, tech-enabled ecosystem.

This curriculum focuses on transforming traditional account management into a value-added, trusted advisor model. Through immersive modules that leverage real-world banking case studies, participants will master the art of navigating complex stakeholder environments, balancing algorithmic efficiency with high-touch personal service. The program is designed to bridge the gap between legacy banking infrastructure and the future of embedded finance, ensuring that every interaction delivers measurable ROI while reinforcing the bank's reputation for security, agility, and client-focused excellence.

Programme Curriculum

Relationship Management for Banks Training Course

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Course Duration

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Course Objectives

1. Master GenAI-integrated client profiling for precision service delivery.
2. Implement data-driven cross-selling to maximize wallet share.
3. Execute proactive risk mitigation using real-time behavioral analytics.
4. Develop Omnichannel CX strategies that unify digital and physical touchpoints.
5. Leverage ISO 20022 payment insights to provide richer, more timely client advice.
6. Achieve trusted advisor status through advanced consultative selling frameworks.
7. Optimize account-based marketing (ABM) for high-net-worth and corporate segments.
8. Master service recovery protocols to rebuild trust during market volatility.
9. Align ESG-driven investment advisory with shifting client value propositions.
10. Navigate open banking ecosystems to unlock new value for business clients.
11. Refine executive presence for high-stakes C-suite presentations and negotiations.
12. Build cyber-resilient client relationships through transparent security education.
13. Integrate performance metrics (NPS, CLV) into day-to-day portfolio management.

Target Audience

- Senior Commercial & Corporate Relationship Managers
- Private Banking & Wealth Management Advisors
- Business Development Executives
- Branch Managers & Customer Success Leads
- Retail Banking Portfolio Managers
- Digital Transformation Banking Consultants
- Fintech Partnership Managers
- Customer Experience (CX) Strategists in Finance

Training Modules

Module 1: The AI-Augmented Relationship Manager

- Leveraging GenAI for automated meeting prep and insights.
- Hyper-personalization at scale using predictive data analytics.
- Balancing AI efficiency with essential human empathy.
- Case Study: How a Tier-1 bank used AI to reduce churn by 15% in the HNW segment.

Module 2: Strategic Client Segmentation & Life-Event Mapping

- Dynamic profiling beyond basic demographics.
- Mapping banking journeys to client "life events."
- Identifying growth triggers in corporate portfolios.

- Case Study: Proactive wealth preservation strategies during a major corporate acquisition.

Module 3: Advanced Consultative Selling & Value Propositions

- Transitioning from "product pusher" to "trusted advisor."
- Techniques for articulating value in complex financial environments.
- Mastering the art of high-impact questioning.
- Case Study: Transforming a distressed commercial account into a profitable long-term partnership.

Module 4: Managing Risk and Compliance as a Value-Add

- Proactive covenant monitoring without alienating clients.
- Navigating complex regulatory landscapes (KYC/AML) smoothly.
- Turning compliance friction into a trust-building opportunity.
- Case Study: Navigating a cross-border regulatory audit while maintaining high client satisfaction.

Module 5: Digital Excellence & Omnichannel Integration

- Seamlessly blending mobile app convenience with branch expertise.
- Driving digital adoption for routine tasks.
- Maintaining consistent brand voice across all channels.
- Case Study: Successful migration of 40% of retail transactions to self-service channels through relationship-led education.

Module 6: Negotiation and Conflict Resolution

- Interest-based negotiation for pricing and credit terms.
- De-escalation tactics for complex service failures.
- Managing "The Service Recovery Paradox" to boost loyalty.
- Case Study: Resolving a high-stakes credit dispute with a key corporate client.

Module 7: Sustainable Growth & Portfolio Management

- Calculating risk-adjusted return on capital (RAROC).
- Prioritizing resources for maximum portfolio profitability.
- Strategies for "farming" existing accounts for deeper penetration.
- Case Study: Increasing wallet share in a stagnating SME portfolio.

Module 8: Building a Future-Ready Personal Brand

- Establishing thought leadership in a digital-first world.
- Leveraging professional networks and social banking.
- Continuous learning and adaptability in the fintech age.
- Case Study: How an RM utilized LinkedIn and content strategies to win 5 new institutional mandates.

Training Methodology

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.

- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Online	$1,000
21 Sep 2026	25 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Physical	$0

Ready to enroll or request a customized program? Book online or contact us:

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Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com