

Course ID: TGS-2023040914

Mastering High-Net-Worth Customer Relationships

ELIGIBLE FOR
SKILLSFUTURE
SUBSIDIES + CREDIT

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Duration
2-Days | 13 Hours

Training Format
Classroom Training

Full Fee

\$1,090

*Net Fee

\$390*

** Terms & Conditions applies.
Refer to next page for funding eligibility*

Course Overview

This workshop, developed by top sales performers with global best practices, focuses on improving the quality of conversations to confidently engage clients in a more holistic way. By instilling "best practices" in sales effectiveness, our course teaches participants how to build positive relationships with clients and prospects, ultimately leading to increased customer loyalty, repeat business, and profitability.

- ➔ It is essential for sales professionals to learn how to build positive customer relationships because it can lead to long-term customer loyalty, repeat business, and increased profits.
- ➔ By using persuasive language and developing structured sales conversations, sales professionals can build stronger relationships with their clients and prospects.

STATISTICS

20%

of sales professionals are successful because they do not just sell; they help clients buy.

Learning Outcome

- Apply client book analysis to review background of customer relationship management and determine clear objectives
- Develop customer relationship management strategies with an understanding of communication strategies essential for maintaining positive and effective relations with customers
- Facilitate operational plan development in accordance with organizational procedures in developing and maintaining positive relations with customers to support achievement of customer relationship management strategies
- Set key performance indicators to evaluate the effectiveness of customer relationship management
- Analyze evolving technologies and technology platforms that impact customer acquisition positively

Target Audience:

- This course is suitable for professionals in the retail business, property business, or any other form of business who want to improve their skills to build positive customer relations to improve sales performance.

Assessment Method

Lecture | Practical Exercises | Case Study

Technical Skills and Competency

Consultative Selling

Course Outline

At the completion of the course, e-certificate will be awarded to trainees who have demonstrated competency in the WSQ assessment and achieved at least 75% attendance.

Trainers



Bernard Soo



Renee Chong

Day 1	Day 2
AM-PM	AM-PM
<p>Day 1: Tools, Concepts & Knowledge</p> <ul style="list-style-type: none"> Welcome & Introduction Customer Relationship Management Plan and Strategy <ul style="list-style-type: none"> Client Book Analysis Operational Plan Development <ul style="list-style-type: none"> Communication strategies Establish Trust 5 Sales Performance Pillars 	<p>Day 2: Application & Assessment</p> <ul style="list-style-type: none"> Evaluate Customer Relationship Management <ul style="list-style-type: none"> Annual Sales Strategy and Plan Customer Relationship Management (CRM) Systems Assessments Workshop Conclusion

Course Fee & Funding | *Funding valid till: 20-12-2025*

Course Fee and Government Subsidies

	Self-Sponsored / Company Sponsored (S\$)	
	Before GST	With GST
Non-SCPR	1,000	1090
SCPR Above 21 Years Old	500	590
SCPR Above 40 Years Old	300	390

Baseline: Singaporean/PR age 21 and above

MCES(Mid-Career Enhanced Subsidy): Singaporean age 40 & above

SkillsFuture Enterprise Credit (SFEC)

Eligible Singapore-registered companies can tap on \$10,000 SFEC to cover out-of-pocket expenses.

Visit this link for SkillsFuture Credit information

www.skillsfuture.gov.sg/sfec

SkillsFuture Credit

Eligible Singapore Citizens can use their SkillsFuture Credit to offset course fee payable after funding.

Visit this link for SkillsFuture Credit information

www.skillsfuture.gov.sg/initiatives/mid-career/credit

Fee Details

Self-sponsored Individual

www.skillsfuture.gov.sg/funding-individuals

Employers

www.skillsfuture.gov.sg/funding-employers

Register Today!

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[Website](http://www.eli.academy.sg) eli.academy.sg

[Instagram](#) ELI Academy

Trainers

Bernard Soo

Founder – Entrepreneur
Leadership Institute



- Bernard is an accomplished professional with over 17 years of experience in the banking and wealth management industry. For the past 7 years, Bernard has been serving high-net-worth individuals across the region in a frontline capacity, providing exceptional service and support. With over 10 years of senior management experience, Bernard has designed and executed successful wealth propositions and equities product management strategies.
- During his time at Standard Chartered Bank, Bernard served as Head of Wealth Proposition, where he was responsible for designing and implementing various propositions aimed at providing comprehensive financial planning services to clients. This included retirement planning, children education, legacy planning, and accredited investor propositions for high-net-worth individuals. Additionally, Bernard was the Head of Online Equities Trading platform, where he oversaw product management, business strategy, and online equities business management.
- At UOB, Bernard served as Head of Digital Wealth Proposition and was the Product Owner of UOB Roboadvisers, Simple Invest, and Simple Insure. He was also the Business Lead representing UOB in the MAS-driven Open Banking initiative, playing a pivotal role in driving the bank's digital transformation efforts.
- Bernard is also an active contributor to the CitaDAO DeFi Property Tokenising platform. He was previously an Executive Committee Member in the Singapore Fintech Association, representing the Fintech community in Singapore. With over 5 years of experience in Fintech providing consultation and product development, Bernard is an expert in emerging technologies, and he has been conducting outreach and training on these topics for the past 3 years.

Renee Chong

CEO – Entrepreneur
Leadership Institute



- Renee is a seasoned educator and policy maker with more than 16 years of experience in Singapore's education landscape. Her deep understanding of education policy, coupled with her strong leadership skills, makes her an invaluable asset to any organization.
- Throughout her career, Renee has held various key positions within the Ministry of Education, including Lead Manager in the Higher Education Policy Division and Head of Department for Integrated Curriculum in Junior College. In these roles, she led teams responsible for the development of innovative curriculum and educational policies.
- Renee's ability to manage teams effectively has allowed her to coordinate with different stakeholders in the education sector, including local and overseas industry partners, educators, parents, and students. By aligning curriculum and policies with the needs of the education sector and the future of Singapore, she has helped to shape a more dynamic and competitive education landscape.
- With her extensive experience as an educator and policy maker, Renee is adept at navigating the complex education policy landscape in Singapore. Her expertise and leadership skills make her a valuable asset to any organization seeking to develop innovative education policies and curriculum that meet the needs of students, educators, and the wider community.

Contact Us:

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