

Course ID: TGS-2023040923

# Prospecting and Engaging High-Net-Worth Individuals

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Duration  
2-Days | 13 Hours

Training Format  
Classroom Training

Full Fee

**\$981**

\*Net Fee

**\$351\***

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

## Course Overview



Learn to master the art of customer acquisition for lasting business success.



Discover the vital skills required to build and nurture client relationships, boost revenue, and enhance brand competitiveness.



Gain the knowledge to increase profits and drive innovation while securing long-term customer loyalty.

## Target Audience:

- Professionals such as head of business development, head of customer acquisition, sales manager or sales director in retail, property, or any other forms of business



## Considering Additional Sales Training Options?

### Other Sales Workshops Available:

- ✓ Mastering High-Net-Worth Customer Relationships
- ✓ Win-Win Strategic Negotiation

Visit [eli.academy](https://eli.academy) for more info

## Learning Outcome

- Examine customer acquisition frameworks and customer acquisition strategies
- Develop effective customer acquisition strategies to acquire new customers
- Devise systems and models for customer acquisition management to attract and engage customers
- Identify target markets by defining the market profiles to enhance the rate of customer acquisition
- Examine the importance of building customer relationships and increasing customer acquisition rate.
- Provide guidance in the development of operational plan to support the achievement of customer acquisition strategies
- Set suitable key performance indicators to evaluate the effectiveness of customer acquisition management
- Identify performance metrics to measure the efficiency of customer acquisition management
- Establish data aggregation mechanisms to collect and report customer acquisition data
- Evaluate the costs of customer acquisition programs
- Analyze evolving technologies and technology platforms that impact customer acquisition positively

Assessment Method  
Lecture | Practical Exercises | Case Study

Technical Skills and Competency  
Customer Acquisition Management

## 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><b>Day 1: Tools, Concepts &amp; Knowledge</b></p> <ul style="list-style-type: none"> <li>Welcome &amp; Introduction</li> <li>Customer Acquisition Plan &amp; Strategy                             <ul style="list-style-type: none"> <li>7-Step Sales Framework and Strategies to acquire new customers</li> <li>Advisory Framework/Model</li> </ul> </li> <li>Operational Plan Development                             <ul style="list-style-type: none"> <li>Prospecting Business Plan</li> <li>Client Conversations</li> </ul> </li> <li>Evaluate Customer Acquisition Management</li> </ul>	<p><b>Day 2: Application &amp; Assessment</b></p> <ul style="list-style-type: none"> <li>Recap</li> <li>Assessments</li> <li>Workshop Conclusion</li> </ul>

## Course Fee & Funding | *Funding valid till: 22-12-2025*

### Course Fee and Government Subsidies

	Self-Sponsored/ Company Sponsored (S\$)	
	Before GST	With GST
Non-SCPR	900	981
SCPR Above 21 Years Old	450	531
SCPR Above 40 Years Old	270	351

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](http://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](http://www.skillsfuture.gov.sg/initiatives/mid-career/credit)

### Fee Details

Self-sponsored Individual

[www.skillsfuture.gov.sg/funding-individuals](http://www.skillsfuture.gov.sg/funding-individuals)

Employers

[www.skillsfuture.gov.sg/funding-employers](http://www.skillsfuture.gov.sg/funding-employers)

## Register Today!

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[View Workshop Dates](#)

### Contact Us:

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## 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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