

Course ID: TGS-2023040914

# Mastering High-Net-Worth Customer Relationships



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**SKILLSFUTURE**  
SUBSIDIES + CREDIT

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## Duration

Five Half—Days | 15 Hours

## Training Format

**Virtual - Zoom**



Full Fee

**\$1,090**

\*Net Fee

**\$390\***

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

## Course Overview



### Remember & Understand

- **Uncover** and **decode** Fundamentals of Customer Relationship Management (CRM) for high-net-worth individuals (HNWIs).



### Identify who are your worthy clients to invest your time and effort

- **Leverage** on technology to save your time.



### Create & Apply

- Gain practical, hands-on experience to **acquire the skill sets** needed to win your clients' hearts.

## Target Audience

- Individuals aged 21 and above.
- Diploma Holder.
- A minimum of one year's working experience

## Personalized service is paramount

**84%**

of **HNW** individuals say that being treated like an individual is more important than getting the best price.

Source: Capgemini World Wealth Report

What can I do to provide such exceptional service that my clients feel compelled to share their positive experience with others?

## UNLOCK THE SECRET FORMULA

Learn how to build a lasting relationship with your High Net Worth clients.

## Learning Outcomes



Know HNWI characteristics and relationship needs.



Assess effective CRM strategies for HNWIs.



Create Personalized client relationship plans.



## More tools and tips to become the next top agent!

Other Sales Workshops Available:

- ✓ Prospecting and Engaging High-Net-Worth Individual
- ✓ Win-Win Strategic Negotiation



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

## Assessment Method

Written Exam | Case Study

## Technical Skills and Competency

Customer Relationship Management Operations

## 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

**Session 1**  
10.00 AM – 1.00 PM

**Introduction to Customer Relationship Management**

- Welcome and Rules of Engagement
- What key qualities distinguish exceptional Sales -Professionals/ Real Estate Agents?
- Customer Relationship Management Competencies:
- Learning Objectives & Agenda
- 3 Types of Client Conversations
- Customer Relationship Management Strategy
- A written Plan & Strategy Works (Statistics)
- Challenges in Managing Customer Relationships
- Introduction to Customer Book Management

**Session 2**  
10.00 AM – 1.00 PM

**Customer Relationship Management Plan and Strategy**

Crafting a Customer Book Management Strategy:

- Step 1: What's the Current Situation? (As-Is)
- Step 2: Map out my "As-Is" customer book (Sticky-note activity)
- Step 3: What is My Transition Plan?
- Step 4: My Time Management Strategy
- Step 5: My New Farming Plan
- Session 2 Wrap Up

**Session 3**  
10.00 AM – 1.00 PM

**Operational Plan Development**

- What are the common characteristics and mindsets among HNWIs?
- Understanding Customer Preferences
- Communication Channels
- Customer Contact Rhythm
- Tools for Effective Communication - mDISC
- Speaking with Absolute Conviction & Gravitas (Verbal & Non-verbal)
- Unique Value Proposition
- Listening for Clues & Cues
- Understanding Needs & Wants
- Handling Objections – 4 Es
- Advisory Framework
- Developing an Operational Plan

**Session 4**  
10.00 AM – 1.00 PM

**Evaluate Customer Relationship Management**

- Annual Sales Strategy
- Setting Key Performance Indicators (KPIs) for CRM Evaluation
- Customer Relationship Management Systems
- Evaluate Customer Relationship Management
- Tools & Concepts (Recap)
- Assessment Briefing

**Assessment**  
10.00 AM – 1.00 PM

**Written Assessments**

- Short Answer Questions
- Case Study

**Feedback on Assessment**

## 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	1,000	1090
SCPR 21 Years Old and Above	500	590
SC 40 Years Old and Above	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](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)

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**Register Today!**

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### Contact Us:

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ELI Academy

## Principal 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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