momenta Group Pte. Ltd.
UEN No. 200516087K

Eligible for SkillsFuture Subsidies + Credit

TGS-2023040914

Mastering High-Net-Worth Customer Relationship

From Service Provider to Trusted Advisor

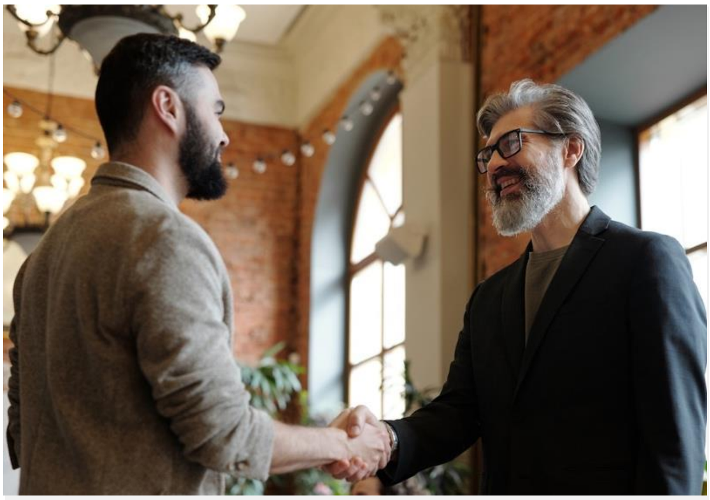
Learn to provide exceptional service, build lasting relationships with high-net-worth clients, and master CRM strategies to become their trusted advisor.

2 Days | 14 Hours | In-Person Workshop

Full Fee	*Net Fee
$1090	**$390**

Scan to View Course Details

* Refer to next page for funding eligibility



The Unspoken Promise: Earning Their Trust, Securing Your Legacy.

This comprehensive session training is meticulously designed for professionals aiming to elevate their business by mastering the art of attracting and retaining high-net-worth (HNW) individuals. You will learn the secret formula of private bankers, a proven strategy to significantly increase revenue and generate a consistent flow of successful leads. The course covers foundational concepts of customer relationship management, strategic planning, and operational development. You'll gain crucial skills in understanding the mindset of HNW clients and building trust to become their go-to holistic advisor. This course provides the tools and knowledge to overcome challenges and build lasting, profitable relationships.

The Go-To Advisor Toolkit

Mastering Customer Book Analysis

Understand and apply customer book analysis to define clear objectives in customer relationship management.

Crafting HNW Communication Strategies

Develop effective CRM strategies with communication techniques tailored to maintain impactful relations with high-net-worth clients.

Measuring CRM Performance

Implement and evaluate an annual sales strategy using key performance indicators (KPIs) to assess CRM effectiveness for sustained growth.

Your Journey to Becoming a Trusted HNW Advisor

Mastering HNW Engagement

Learn to communicate with high-net-worth (HNW) individuals on their terms. This section teaches you to use strategic questioning and develop the right vocabulary to uncover their needs beyond basic finances.

Building Authentic Relationships

Discover how to build deep and lasting trust with HNW clients. By understanding their unique needs and mastering objection handling, you'll be able to position yourself as a valued and holistic advisor.

Implementing Proven Growth Strategies

Gain access to a winning formula for acquiring HNW clients. This section helps you develop an acquisition plan and identify key performance indicators (KPIs) for consistent revenue and leads.

Ms. Jessica +65 8719 2059
mailer@eli.academy

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.

Day 1

Session 1

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

Day 1 (cont.)

Session 2

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

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

Day 2

Session 3

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

Day 2 (cont.)

Assessment

Written Assessments

- Short Answer Questions (60 mins)
- Case Study (90 mins)

Course Conclusion

Course Fee and Government Subsidies

	Self-Sponsored / Company Sponsored (S$)	
	Before GST	After GST
Foreigner	1000	1090
Singapore Citizen 25-39 years old & Singapore PR	500	590
Singapore Citizen 40 years old & above	300	390

Course Support

- SFC (SkillsFuture Credit) claimable, including GST
- SFEC claimable for eligible Singapore-registered companies
- PSEA claimable

Applicable SSG Grant

- SkillsFuture Funding (Baseline)
- SkillsFuture Mid-career Enhanced Subsidy
- SkillsFuture Enhanced Training Support for SMEs

Fee Details

Self-Sponsored Individual
https://www.myskillsfuture.gov.sg/content/portal/en/career-resources/career-resources/education-career-personal-development/SkillsFuture_Credit.html

Skillsfuture Enterprise Credit information (SFEC)
https://skillsfuture.gobusiness.gov.sg/support-and-programmes/funding/skillsfuture-enterprise-credit-sfec

Employers
https://skillsfuture.gobusiness.gov.sg/support-and-programmes/funding

Ms. Jessica +65 8719 2059
mailer@eli.academy