

Managing Client Relationships

Duration: 1 Day

Maximum 12 delegates

About the course

This workshop looks at the steps we need to take to ensure the relationship we build with our clients is long lasting and constructive to all concerned. Case studies are used to put areas of the learning into practice.

Who should attend?

This course has been designed for delegates who would like to develop the skills required for excellent and ongoing relationships with both existing and new clients.

Course content

- Managing the individuals expectation of the relationship
 - communicating effectively with the client to assess specific requirements
 - asking the right questions
- Planning for the future
 - managing expectations
 - managing time in order to develop the relationship in the way the client expects
 - preparation for a positive call or meeting
- Communicating the right information
 - the importance of communicating both good and bad news to enable the client to make the right choices
 - using reports and other tools
 - review of FCA regulations, the information the FCA requires us to impart and how it can be expressed in the most effective way
 - the overall message, the person they go to for support and information