



## CLIENT RELATIONSHIP MANAGEMENT (CRM)

October 19<sup>th</sup> to 22<sup>th</sup> 2009 – St. Georges, Grenada

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### OVERVIEW

This course is designed to be highly interactive and participatory through the use of role-plays and case studies. Participants are encouraged to use everyday examples from their experience and challenges in managing client relationships. Throughout the programme role-plays and scenarios will be based on participants' own product areas. Feedback will be provided to delegates on a one-to-one basis at each stage of the course.

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### WHO SHOULD ATTEND?

The course is aimed primarily at corporate or investment banking executives who are or will be involved in CRM from the following departments:

- Corporate Banking / Lending
- Credit
- Trade Finance
- Treasury / Treasury Sales
- Institutional Sales
- Project / Structured Finance
- Syndications
- Investment Banking / Corporate Finance
- Private Banking

The course will also be applicable to those who handle 'internal client' relationships. For instance, executives from areas such as:

- Internal audit
  - IT / MIS / Systems Security
  - Operational Risk
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### COURSE OBJECTIVES

This course sets out to equip participants with the skills to analyse and understand the current role of CRM – both for the bank and for the client – as well as the tools and techniques of on-going client acquisition and retention. Whether you are relatively new to CRM or have existing experience, the course will allow you not only to refine your skills of communication and rapport-building but also to determine the context of and strategy for your future CRM efforts.