



# RAISING CLIENT SERVICE EXPERIENCE (FOR ARMS)

IBF Standards - Private Banking and Wealth Management

8 IBF-STs TRAINING HOURS

For registration of public scheduled session, [click here](#).  
To organize a tailored session for your organization, please contact us at [email@salmonthrust.com](mailto:email@salmonthrust.com)

Good client engagement in the Private Bank refers to the ongoing interaction between its front- liners and its valued clients. Enhancing this relationship with well-designed strategies and approaches that can consistently deliver above expected service standards is of utmost importance. The business of the private bank is trust. Good client experience allows trust to be consistently enhanced, even when faced with any service lapse needing service recovery processes. This following course introduces the basics of clients' experience management processes and addresses the competency of handling service challenges with private banking clients.

Participants will learn how they can approach clients with the right service attitude and strategies that will build rapport and trust with clients quickly. They will enhance their communication skills and conflict resolution strategies through interactive learning. This will enable them to contribute positively to a primary goal of the Private Bank to retain and grow long-term, profitable relationships with existing clients.

## TARGET AUDIENCE

- Assistant Relationship Managers

## LEARNING OUTCOMES

- Develop rapport and establish trust with various customer segments through effective verbal and non-verbal communication
- Uncover customer requirements and recognise potential business opportunities
- Provide prompt service delivery tailored to customer's initial and subsequent needs through product referrals
- Provide coaching in effective machine operation to customers
- Apply best-fit conflict resolution techniques when handling objections and conflicts
- Identify frequently asked questions asked by customers
- Contributes ideas and responses to customers queries and requests
- Analyse trends and patterns in the customer service knowledge base
- Develop knowledge of organisation's product or service offerings and customer profile
- Establish customer rapport to build customer confidence
- Provide post-sales follow up
- Respond to escalated service challenges, in accordance with service recovery procedures
- Respond to service opportunities and escalated service challenges to reinforce customers' confidence in the organisation

## COURSE OUTLINE

### The Importance of Client Experience

- Key Service Expectations and Perspectives
- Identifying Organizational Service Standards
- Setting Standards Accurately

### Regulatory Guidelines & Customer Experience

#### Customer Service Knowledge Base

- How to use knowledge base to identify business opportunities
- How to use Frequently Asked Questions
- Coaching Clients using FAQ through technical support

#### Handling conflicts effectively with Clients

- 4As of Conflict Resolution
- Address Conflict Issues Effectively
- Effective Verbal and Non-verbal Communication
- Identifying Service Challenges

#### Listing the most common types of Service Challenges in PB Importance of Customers' Rapport

- How to develop customer rapport over the phone

#### Product & Service Knowledge

- Methods in gaining product & service knowledge
- How product & service knowledge assist in service challenges

#### Escalating Service Challenges

- How to escalate service challenge
- Service Recovery

#### Business Opportunities in Service Challenges

- Service Recovery and Business Development
- Service Recovery Paradox

#### Post-Sales Follow Up

#### Assessment - MCQ

## IBF STANDARDS

This course is designed to meet the following Technical Skills and Competencies (TSCs) in Skills Framework for Financial Services:



This programme has been accredited by The Institute of Banking and Finance (IBF) under the IBF Standards.

**Industry Segment** : Private Banking and Wealth Management  
**Job Role** : Assistant Relationship Managers

**Technical Skills and Competencies (TSCs) and Proficiency Level**  
 B5. Customer Experience Management (PL3)  
 B11. Service Challenges (PL3)

### IBF-STTS

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Standards Training Scheme (IBF-STTS), subject to all eligibility criteria being met. Candidates are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

Find out more on [www.ibf.org.sg](http://www.ibf.org.sg)

### ABOUT IBF CERTIFICATION

Participants are encouraged to access the [IBF MySkills Portfolio](#) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process [here](#).

### ABOUT THE IBF STANDARDS

The IBF Standards are a set of competency standards for financial skills. These Standards are developed in partnership with industry leaders and provide a professional development and skills roadmap for financial sector practitioners to excel in their respective job roles. They currently cover 12 industry segments in the financial sector.

### ABOUT THE INSTITUTE OF BANKING AND FINANCE SINGAPORE

The Institute of Banking and Finance Singapore (IBF) is the national accreditation and certification agency for financial industry competency in Singapore under the IBF Standards. Find out more on [www.ibf.org.sg](http://www.ibf.org.sg)

## ABOUT SALMON THRUST

Founded in 2004, Salmon Thrust is committed to delivering real-world banking and financial training to professionals working in banks, corporates, government agencies, and other financial institutions.

Based in Singapore, we offer our clients in the region a broad range of up-to-date financial topics, delivered via classroom training and e-learning. Our courses range from foundational programmes for new entrants, right through to the most complex and current topics in the industry.

At Salmon Thrust, we are attentive to our clients' diverse learning needs. We identify relevant courses to bridge the learning and skill gaps, empowering our clients to make better decisions and bring real value to both their customers and organisations.

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