

CLIENT RELATIONSHIP MANAGEMENT

EXPERT



MR. CAMILLE MOUSSA

Camille Moussa has had extensive experience in the financial markets, for over 15 years. He had been employed with both Morgan Stanley and UBS for numerous years in the United States. He holds several U.S. Securities Certifications along with other U.S. and international professional qualifications. He is the Academic Director of Financial Markets Programs at École Supérieure des Affaires in Beirut and teaches courses in financial markets in ESA's Masters in Finance and Executive MBA programs. He also teaches at ESCP Europe in London in the Masters in Finance program, and has been invited to teach in three additional Masters Programs (Masters in Management – ranked 1st globally, Masters in Law, and Masters in Financial Engineering) at ESCP Europe London's and Madrid's campuses. He created a program in Financial Markets at ESA that was co-branded with Thomson Reuters and is based on the book "A Practical Interpretation of Investments and Analysis", written by him. He created the course "Investments and Risks", which was added to the BDL circular 245 (amendment to circular 103), requesting bankers to meet certain qualifications. The book "Investments and Risks" is also written by Camille.

AUDIENCE

- Wealth managers
- Private bankers
- Relationship managers
- Branch managers, assistant branch managers
- All persons dealing and managing client relationships

DURATION

2 days (9 AM – 5 PM)

DATE

20th-21st of May 2013

LANGUAGE

English

OUTLINE

The banking industry more than ever has become amalgamated. Private banking, wealth management, brokerage services, advisory business and related services, all form responsibilities of the banker, along with traditional banking services. Competition, particularly, has become fierce. Retail banks have increased their standards while traditional private banks have lowered their requirements to attract and compete for business.

What separates bankers in the industry today are not the products or services offered, merely because they are available by everyone, for everyone; nor is it the brand name of the institution that backs a banker. It is simply the banker.

This program is designed to assist bankers in identifying the true role of a client manager, to properly assess needs, to design and build relationships, and most importantly, to sustain them. Technical knowledge, as important as it may be, is not the sole factor in maintaining successful relationships.

The objective is to have candidates be subject to different client roles, needs, objectives, complaints, and all potential scenarios that may arise from a client relationship. This will provide participants with the client management relationship skills that will be acquired through role-playing and simulation tests. The result is that bankers will possess the ability to enhance their skills and better manage their client relationships.

Participants will be subject to real client scenarios. They will be required to present solutions and deal with concerns presented by clients. The instructor and peers will assess every participant. This process is very practical and the technique has proven very valuable.

PROGRAM

DAY 1

Detailed discussion of the sales process, client development and management, client retention; covering all aspects of the client cycle, from acquisition, to service and relationship.

DAYS 2 & 3 (AS APPLICABLE)

Four role play simulations in formal and informal settings to make best use of opportunities to attract and generate business, and develop and sustain client relationships.

