UNION OF INVESTMENT COMPANIES
اتحاد شركات الاستثمار

ISC INVESTMENT STUDIES CENTER
مركز دراسات الاستثمار

Relationship and Client Management: Building Strong Client Partnerships

(Wednesday & Thursday) 15th & 16th January 2025 (2 days)

09:00AM - 02:00PM

In-person @ UIC premises

English

FEES FOR UIC MEMBERS
KWD 180

FEES FOR NON-MEMBERS
KWD 230

Dr. Arezou Harraf

Introduction:

This immersive two-day training is designed for professionals who engage directly with clients and seek to strengthen their relationship-building and management skills. By exploring the principles, practices, and strategies for exceptional client engagement, participants will learn how to enhance client satisfaction, foster loyalty, and build lasting partnerships. Through interactive exercises, real-life scenarios, role-play simulations, and reflective discussions, attendees will develop the competencies required to communicate effectively, manage expectations, resolve conflicts, and craft strategic action plans for continuous improvement.

Target Audience:

- Client Relationship Managers
- Financial Advisors and Wealth Managers
- Sales Teams and Account Managers
- Customer Success Professionals/Managers
- Business Development Executives
- Consultants and Service Providers
- Team Leaders and Managers
- Marketing and Customer Experience Professionals

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Objectives:

By the end of this two-day program, participants will be able to:

1. Understand the fundamentals and strategic importance of relationship and client management.
2. Employ client-centric approaches to drive business success.
3. Utilize effective communication, active listening, and questioning techniques tailored to different client personalities.
4. Anticipate, manage, and surpass client expectations.
5. Build trust and credibility, even in challenging situations.
6. Resolve client conflicts and manage difficult interactions confidently and professionally.
7. Implement strategies to enhance client satisfaction, loyalty, and retention.
8. Develop a comprehensive, personalized action plan for long-term client relationship management success.

Outline:

Day 1 Agenda

Morning

Module 1: Introduction to Client Relationship Management (Extended)

- Description:
  - Define client relationship management (CRM) and its role in long-term business growth.
  - Examine the client relationship lifecycle: acquisition, onboarding, development, and retention.
  - Highlight the strategic impact of strong client relationships on brand reputation and revenue.
- New Focus Areas:
  - Introduce CRM tools and technologies that support relationship building.
  - Discuss industry best practices and benchmarks.
- Hands-on Activity: Client Relationship Mapping
  Participants map out the stages and key touchpoints of a client relationship relevant to their roles, identifying areas for enhancement.
  Extended Discussion: Groups share their maps and compare approaches, noting industry differences and best practices.

Module 2: Understanding Client Needs and Expectations

- Description:
  - Learn advanced techniques for uncovering both stated and unstated client needs.
  - Discuss the critical role of empathy, emotional intelligence, and cultural sensitivity in client interactions.
  - Align expectations by setting clear objectives, timelines, and success measures.

- Hands-on Activity: Role-Playing Scenarios
  In pairs, participants engage in role-play where one acts as the client and the other as the service provider, practicing active listening, open-ended questioning, and paraphrasing. Extended Debrief: Facilitator-led discussion on how different questioning techniques reveal deeper client insights.

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Afternoon

Module 3: Effective Communication Skills

- Description:
  - Explore verbal, written, and non-verbal communication methods and their impacts on client perception.
  - Adapt communication styles to diverse client personalities and cultural backgrounds.
  - Practice techniques for delivering concise, persuasive messaging and clarifying misunderstandings.
- Hands-on Activity: Communication Style Assessment
  Participants complete a self-assessment to identify their primary communication style.
  New Exercise: Small groups role-play adjusting their communication styles to fit various client personas, followed by group feedback.

Module 4: Building Trust and Credibility

- Description:
  - Understand how trust is formed and maintained over time.
  - Identify credibility-building practices such as expertise demonstration, consistency, and reliability.
  - Explore the importance of transparency and follow-through in strengthening relationships.
- Hands-on Activity: Trust-Building Exercise Participants
  create a trust-building checklist with concrete actions. Reflection Session: Each participant shares one action they can implement immediately to build trust with current clients.

Wrap-Up & Reflection for Day 1

- Review key learnings from Modules 1–4.
- Encourage participants to reflect on their current client relationships and identify one key insight they will apply right away.

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Day 2 Agenda

Morning

Module 5: Managing Difficult Situations and Conflict Resolution

- Description:
  - Identify common causes of client dissatisfaction and conflict.
  - Learn techniques for de-escalation, negotiation, and maintaining professionalism under pressure.
  - Use problem-solving frameworks to address client issues effectively.
- Hands-on Activity: Conflict Resolution Workshop
  Participants analyze challenging client case studies and collaborate in small groups to develop step-by-step resolution strategies.
  Extended Practice: Role-play de-escalation techniques with structured feedback from peers.

Module 6: Enhancing Client Satisfaction and Loyalty

- Description:
  - Understand the key drivers of long-term client satisfaction and retention.
  - Explore strategies for consistently exceeding client expectations through value-added services, personalization, and proactive communication.
  - Implement methods for gathering, analyzing, and acting on client feedback to drive continuous improvement.
- Hands-on Activity: Client Feedback Plan
  Participants design a feedback collection and implementation plan, outlining how they will track client satisfaction metrics and use insights to refine offerings.

Afternoon

Module 7: Developing a Client Relationship Action Plan

- Description:
  - Integrate the lessons learned from all previous modules.
  - Guide participants in drafting a personalized action plan with clear, measurable goals.
  - Focus on sustainability: ensure action plans include timelines, accountability measures, and success indicators.
- Hands-on Activity: Action Plan Development
  Participants create detailed, individualized action plans incorporating communication improvements, trust-building initiatives, conflict resolution strategies, and feedback loops.
  Peer Review: Participants pair up to review and provide feedback on each other’s action plans.

Final Review & Next Steps

- Summarize all key learnings and highlight best practices identified over both days.
- Discuss methods to maintain momentum, including regular self-assessment, peer coaching, and ongoing professional development.
- Q&A session to address any remaining questions or challenges.

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Expert's Profile: Dr. Arezou Harraf

An experienced educator, Dr. Arezou Harraf holds a Ph.D. in Technology Management and Human Resource Training and Development. She serves as the Head of the Department of Business Studies at Box Hill College Kuwait. She is a Visiting Assistant Professor at the University of Nevada Las Vegas during the summer term. She also serves as an academic advisor for several MBA students at Maastricht University.

Dr. Harraf is the founder and CEO of Learn & Evolve LLC. In this capacity, she helps organizations use strategy, science, and psychology to address workforce challenges such as low performance, productivity, turnover, and retention issues. Moreover, Dr. Harraf is co-founder of Amplify Women Leadership Boot-camp to train women with skills to help them advance to executive positions within their organizations and or become successful venture creators and entrepreneurs. With a focus on the future of technology and HR, she consults with organizations on improving existing in-house technology platforms to enhance features relating to HR and employee needs.

Dr. Harraf is vice-chairperson of the Board of Directors at ABCK-Am-Cham Kuwait, where she also leads the Women in Business and Knowledge Economic focus groups and holds additional memberships in the Academy of Human Resource Development, Academy of Human Resource Management, Chartered Institute of Personnel Development, Academy of Management, Women of Tech in MENA, and Graduate Women in Science.