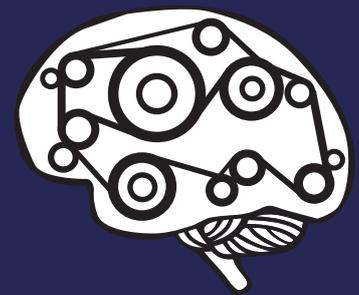


# Transforming client conversations

...from rapport to real value and loyalty

HOW ONE BANK IS RADICALLY DEEPENING RELATIONSHIPS WITH THE SMALL BUSINESS MARKET BY TEACHING THEIR RELATIONSHIP MANAGERS TO UNDERSTAND THE MIND OF THE ENTREPRENEUR



Contexis has been tasked by a large, international bank to transform the effectiveness of their Relationship Manager (RM) community and the true value they bring to their clients.

This programme has had a profound impact on the cultural and commercial performance of those who have participated. Since being piloted in early 2013 the programme has been rolled

out internationally and vertically in the bank to now include RMs and leaders from over 15 key markets in both the Commercial and Corporate Bank.

Contexis understands entrepreneurs and what they really want from their corporate partners

## A unique insight into the value business owners seek

Contexis understands entrepreneurs. Its leaders have built a unassailable reputation over the past 16 years as the experts on private business performance.

Contexis takes this exceptional depth of entrepreneurial experience and understanding to create a learning experience for client-facing managers and leaders in the bank that transforms their understanding of what it is to be a business owner and gives them the skills and confidence to hold genuinely strategic and meaningful conversations with customers and prospects

## A transformation in approach; from rapport to value

This programme has been revolutionary. The most common response of delegates is that it is the 'best training' they have ever received in a bank. The learning modules are often described as 'inspiring' and 'transforming' and have scored an average 90% in terms of impact in all territories.

"A client said to me 'have you just done an MBA?'"

RMs are reporting a transformation in their relationships with clients and immediate mandates won. The difference between building rapport through a genial relationship - which actually **masks** a lack of real value - versus understanding and

delivery what the business owner truly needs, is profound.

"This client had rejected meetings over and over again. They are really price-driven and just didn't want to talk to us. Using this new approach we quickly got him talking about what he really wanted to talk about. We had the meeting on Monday. On Friday we got a £5m mandate! We went from him not wanting to talk to us to being his best alternative."

Delegates report a marked improvement in skills, confidence and role satisfaction.

"This has been mind-opening, game-changing. I have so much confidence now."

Remarkably, more than 50% of the original RM pilot group have since been promoted to senior roles. The centre that ran that programme has gone from near the bottom of the bank's rankings to the top within the space of a year. Anecdotally, customers have also noticed the change in approach with multiple examples of customers writing to RMs to describe their meeting as 'the most useful they had ever had with the bank'.

"After the meeting, for the first time ever, I got an email from them saying 'thanks very much, that was really thought provoking. Looking forward to seeing you again.'"

"We were there over two hours and we only finished because he had another meeting to go to. He said "I really enjoyed this morning's meeting. I was perfectly ready to give you 20 minutes and I had all my excuse prepared." My colleague was gobsmacked."

conversation?

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