

360° Negotiation Skills for Bankers

April 9, 2024 | Burlington, VT
Hosted by RMA and its Vermont Chapter

MEMBER PRICE:
\$475

NONMEMBER PRICE:
\$875

Course Overview

360° Negotiation Skills for Bankers incorporates a variety of training approaches to help bankers build strong negotiating skills and transfer those skills back to the workplace. The interactive design of this course enables participants to experience and practice the most effective ways to negotiate with customers, dig deeper to uncover their true needs, cross-sell other bank services to strengthen the relationship, and sell the credit internally to the best advantage of the bank.

Participants will explore solutions to negotiating challenges that are both tangible and relevant to today's banking environment. Through facilitated discussions, they will transform these solutions into specific strategies for improving their negotiating skills and reaching creative solutions that work for both the customer and the bank.

Duration	Level	Delivery	Topic
7.5 Hours	Foundational	Instructor-Led	Relationship Management

Audience

Credit Administration/Department, Credit Policy Officer, Loan Review/Administration, Portfolio Management Officer, Relationship Manager/Lender, Underwriter/Analyst

Modules

- Module 1: Define Your Interests
- Module 2: Understand Their Interests
- Module 3: Explore Alternatives and Frame Your Solution
- Module 4: Create a Path Forward
- Module 5: Negotiating Internally
- Module 6: Working with Difficult Negotiators

Objectives

Upon completion of this course, learners will be able to:

- Explain the five-step negotiating process and apply it to customer/internal negotiations.
- Identify the five negotiating styles and determine when they are appropriate to use.
- Use active listening/questioning techniques to gain relevant information from customers.
- Use the four-step approach to identify negotiation alternatives that meet both the banks and the customer's interest.
- Explain six effective techniques for presenting an offer.
- Distinguish between critical, negotiable, and insignificant elements of a negotiation.
- Name and describe the characteristics of seven types of negotiating power.
- Describe three strategies to positively influence others.
- Use the five-step negotiating process to respond to difficult negotiating tactics.
- Apply five-step negotiating process to case-study negotiation.

Instructor



Beth C. Hamlin | Caliber Training, Inc. Philadelphia, PA Beth Hamlin, owner of Caliber Training, Inc., previously as a senior manager at CBIZ, a national diversified business services provider, and a founding principal of Caliber Commercial Corporation where she managed the company's analytical and training functions. Hamlin also has 20 years in banking including national / middle market lending and relationship management, credit policy administration, credit training, and bank card operations. Hamlin also consulted with the Pennsylvania Insurance Department on its largest insurance company liquidation.



QUESTIONS?
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