

How can you improve client communication, engagement and experience?

3.00pm

How can you improve client communication, engagement and experience?

- How can relationship managers improve their communication with clients?
- How can you engage prospects and clients in a more impactful manner?
- How can clients engage more with what RMs are discussing with them?
- How can RMs use analytics in a more meaningful way to improve their engagement with clients?
- Clients today expect bespoke, tailor-made advisory – how are you delivering that?
- What's changed in the post-covid world?
- How can content be presented to the RM and client in a more personal way?
- How important is agility and flexibility in handling clients effectively?
- What can the institutions do to help train professionals in these matters?
- What does being client-centric really mean? Do we have enough time for clients?
- Do RMs have the right tools to get the job done?
- How can technology help? How can it help manage the RMs day?
- Are RMs dedicated to delivering the best and most relevant solutions and practices for your clients?
- Do Relationship Managers send engaging information to their clients?

Thomas Bosshard
CEO
Adviscent

Jessica Cutrera
President
Leo Wealth

Dominic Gamble
CEO and Founder
GoUpscale

Karen Tan
Head of Private Banking, Asia
VP Bank

Damien Ryan
Senior Advisor
Teneo

4.00pm

Webinar Ends