



4D Group

Customer Relationship Management for Brokers

Who would benefit?

Clients have holistic insurance needs and this programme considers the way in which you can attract, retain and expand business relationships with your clients by fully understanding their risk exposure.

This programme will be beneficial to all those who are working with clients and need to retain and expand existing insurance accounts.

Objective

To define client relationship management (CRM) and effectively use probes to uncover and understand the importance of and meeting client's risk needs. To develop techniques to acquire business in combination and outline key areas of the client relationship model.

Content

Defining Client Relationship Management (CRM)
CRM drivers
Probing to understanding client needs
Supporting the client
Business in combination
The human factor
building long-term relationships
Managing client expectation and providing a value added service

Duration

One day