How to engage prospects and clients in a more impactful way

3.00pm	How to engage prospects and clients in a more impactful way

- How can you reach and convert prospects digitally?
- With fatigue around webinars and virtual calls – what are the best ways to engage our clients?
- How do the best bankers time their delivery of concepts, ideas, advice and even warnings to make sure that the clients have an open mind and ear to them?
- In the world of WFH and remote connectivity, how are the best advisors actually delivering and timing their recommendations and key information to their clients to ensure they are seen, heard and understood?
- How do the best client advisors influence their clients to take the right decisions, and adopt the right investment and wealth planning strategies?
- How do you balance EQ and IQ in your relationships with your clients, to ensure that they are delivered the right combination of information and detail?
- What are the key skills required to bring a new client on board and to negotiate the right package with them?
- How can this best be done in a remote communication environment so that a fair deal is struck at the outset and so that needs and expectations are aligned?
- What is critical thinking and is it innate or can it be improved with training?
- How important is agility and flexibility in handling clients effectively?
- What can the institutions do to help train professionals in these matters?
- Are you collaborative internally and with external partners and therefore capable of delivering your clients the best range of expertise available, or do you want to hold onto the client at all costs?
- Are RMs dedicated to delivering the best and most relevant solutions and practices for your clients, or influenced by the firm's revenues and their paycheque?

Karen Tan
Head of Private Banking, Asia
VP Bank

Richard Straus
Senior Managing Director, Head of Private Banking - Hong Kong
EFG International

David MacDonald
Head Of Business Development, Singapore
The Sovereign Group

Noor Quek
Founder & CEO
NQ International

Damien Ryan
Senior Advisor
Teneo

4.00pm	Webinar Ends