



Resource resilience for client advisors at banks

The ‚Resource Resilience for Client Advisors‘ training program develops the skills and abilities of client advisors in a targeted and sustainable manner. The client advisor will learn methods that will make him competent and confident in the dialogue with the client.

With the accelerating change in the financial sector, demands and expectations on client advisors are steadily increasing.

- As digitisation is spreading ahead, permanent availability (24/7) is expected.
- In dynamic and uncertain financial markets, clients need reliable and professional advice.
- The banks‘ margins are under strong pressure leading to increasing demands on client advisors to meet management expectations.
- Regulatory guidelines increasingly determine the daily work of the client advisor.

As part of the program, the client advisor examines his communication and interaction preferences to set the basis for systematic improvement. He strengthens his external impact through individual behavioural strategies and optimises resources for the benefit of the client and the bank.

The program is based on the findings of the positive psychology and recent research results on emotional and social intelligence.

Its focus is on key aspects for the client advisor, such as

- the self-perception in the conversation with the client
- the design of the client relationship (in particular trust building)
- decision-making under pressure
- dealing with difficult situations and conflicts in client relations
- stress management



Your benefit

- The client advisor will get to know and understand himself, his strengths as well as his typical behaviour and communication patterns in his daily work.
- The client advisor will find out approaches to use his resources (strength and energy) more effectively and to be an attentive and convincing dialogue partner to the client (i.e. building trust, being a real sparring partner).
- The client advisor will learn strategies to optimally design and implement communication and behavioural patterns.
- The client advisor will be empowered to successfully initiate, develop and manage client relationships.

The program

An online personality inventory will be used to profile the client advisor (analysis of strengths and weaknesses). This will provide indications for individual and targeted development.

In preparation for the workshop, the client advisor will be asked to complete an online personality inventory, which will be discussed in a separate de-briefing.

At the one-day workshop, various aspects of the interaction between client advisors and their clients will be discussed and worked through.

Following the workshop, the client advisor and the coach will set up an individual action plan, which he will follow up and implement in his daily work over the following months.

The content provided is tailored to the needs of the client advisor and the bank.

The ‚Resource Resilience for Client Advisors‘ training program is a recertification measure for bank client advisors (according to SAQ).



About Fintelligence

Fintelligence offers tailor-made and personalized services in personnel and organizational development for financial services providers. In particular, Fintelligence is focussed on offering development measures and

trainings for client advisors in banking. Fintelligence is a registered stock corporation under Swiss law. It is headquartered in Zug, Switzerland.