Relationship Managers Skills and Techniques

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Introduction

The Relationship Managers Skills and Techniques course is designed to strengthen the ability to build a healthy deal pipeline, improve sourcing discipline, and convert client opportunities into confirmed booking results. The course focuses on the practical skills needed to identify potential deals, qualify opportunities, manage follow-up actions, and maintain clear visibility over progress toward minimum sourcing and booking targets.

In corporate relationship work, performance depends on more than regular client communication. It requires structured prospecting, accurate opportunity qualification, disciplined pipeline tracking, and timely coordination with internal teams to move deals forward. This two-day program helps participants organize their relationship activities into measurable outcomes, from early sourcing to booking completion.

The course is built around the title Relationship Managers' Skills and Techniques and the required focus on deal pipeline management, sourcing discipline, and booking target achievement.

Course Objectives

By the end of this course, participants will be able to:

- Build a structured approach to client sourcing and opportunity identification.
- Manage deal pipelines from early lead generation to booking.
- Qualify opportunities based on client need, value, readiness, and probability.
- Prioritize deals according to business potential and conversion likelihood.
- Track sourcing activities against minimum performance expectations.
- Improve follow-up discipline across active and pending opportunities.
- Identify stalled deals and define corrective actions.
- Strengthen client conversations through better questioning and value positioning.
- Coordinate more effectively with internal teams to support deal progress.
- Prepare clearer pipeline updates for management review.
- Improve booking conversion through stronger opportunity control.
- Build a practical action plan to support sourcing and booking targets.

Course Outlines

Day 1: Sourcing Discipline and Client Opportunity Mapping.

- Understanding the role of relationship management in building sustainable corporate business.
- Differentiating between general relationship activity, sourcing activity, and qualified opportunities.
- Identifying target clients based on sector, potential, relationship strength, and business fit.
- Building a structured sourcing plan for existing and prospective corporate clients.
- Mapping client needs, decision-makers, influencers, and approval points.
- Recognizing early signals that indicate possible business opportunities.
- Using client discussions to uncover needs, timing, objections, and next steps.
- Prioritizing prospects according to potential value and readiness.
- Preparing a weekly sourcing plan linked to minimum sourcing expectations.
- Practical exercise on creating a client opportunity map and sourcing action list.

Day 2: Deal Pipeline Control and Booking Target Achievement.

- Understanding pipeline stages from prospecting to confirmed booking.
- Defining clear entry and exit criteria for each pipeline stage.
- Qualifying deals based on documentation, probability, value, timing, and client commitment.
- Tracking active, pending, delayed, and at-risk opportunities.
- Identifying common causes of stalled deals, including weak follow-up, missing documents, unclear ownership, or delayed decisions.
- Coordinating with internal support teams to reduce deal processing delays.
- Preparing accurate pipeline updates that show progress, risks, and expected bookings.
- Translating minimum sourcing and booking targets into daily and weekly actions.
- Building corrective actions for weak sourcing activity or low conversion.
- Final application on preparing a sourcing, pipeline, and booking achievement plan.

Why Attend this Course: Wins & Losses!.

- Improve the ability to build and manage a strong deal pipeline.
- Strengthen sourcing discipline and opportunity identification.
- Increase focus on qualified opportunities rather than general activity.
- Improve conversion from sourcing to booking.
- Build clearer follow-up habits for active and pending deals.
- Reduce delays caused by unclear ownership or missing next steps.
- Improve client conversations through stronger needs analysis.
- Support achievement of minimum sourcing and booking targets.
- Improve pipeline visibility for management review.
- Strengthen coordination between client-facing activity and internal processing.

Conclusion

The Relationship Managers Skills and Techniques course provides a focused two-day framework for improving client sourcing, deal pipeline control, and booking performance.

The first day builds the foundation for structured sourcing, client opportunity mapping, and better prospect qualification. The second day moves into pipeline control, deal movement, booking conversion, and target achievement.

This course connects relationship activity with measurable business results. It helps participants move from general client contact to disciplined sourcing, active opportunity management, and clearer progress toward minimum sourcing and booking targets.

By the end of the course, participants will be better prepared to manage their deal pipelines, improve sourcing quality, follow up on opportunities more effectively, and increase booking results through a structured relationship management approach.

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