

Relationship Manager Excellence Program

Turn more meetings into revenue without adding more hours to your day

THE GAP

Banking customers expect a Relationship Manager who understands their financial objectives and provides solutions that fit their needs. Most RMs have the right intent but lack a formal framework for relational selling. Cross-selling feels like pushing rather than advising because there is no structure for needs-based conversations. The result is reactive account management, inconsistent effort, and missed revenue from existing portfolios.

THE SHIFT

- They can deepen relationships by understanding customer personas and needs
- They can position products as solutions rather than pitching features, building loyalty
- They leave with a sales plan built around their own portfolio, not a generic template

WHAT'S INSIDE

- Relational selling cycle and needs-based conversation frameworks
- Customer segmentation and persona mapping
- Cross-sell and upsell strategy
- NTB acquisition through referrals
- Portfolio planning and pipeline prioritization
- Building a branch sales plan grounded in your own book

WHAT YOU WALK AWAY WITH

- Prioritize client pipeline and manage time more effectively
- Deepen existing relationships and identify cross-sell opportunities
- Apply proven strategies that work in real client conversations
- Stronger RM performance and productivity
- Enhanced customer experience and Net Promoter Score (NPS)
- Higher sales volumes, product penetration, and revenues

WHO IT'S FOR

- Relationship Managers (Retail, Commercial, SME, Corporate)
- Senior Relationship Managers
- Business Development Officers



Salman brings 30 years of Retail and Consumer Banking experience, having held senior leadership roles across Pakistan and Asia Pacific. His career spans ABN AMRO, RBS, NIB, and Citibank, where he built expertise in banking operations, customer experience, and business growth. As CEO of Green Peak, he helps financial institutions drive sustainable growth, operational excellence, and transformation.



Shabnam Minhas brings 25+ years of banking leadership building inclusive teams across ABN Amro, RBS, Faysal Bank, and Citi Bank. An MBA Gold Medalist from IBA and founder of VisionHer, she advocates for women's advancement in leadership and conducts programs on building high-performing diverse teams.