

Training course on customer relationship management

Global Solutions

Customer relationship management

OVERVIEW

This course will introduce the different features of customer relationship management (CRM), outlining how to identify and target prospective customers whilst maintaining relationships with existing customers. More importantly, the course will address the topic from a global perspective, focusing on customer relationship strategies and processes from the point of view of an ECA business. Customers represent a company's most valuable asset. ECAs face an extremely complex task, as they regularly deal with four different customers in the same transaction: the exporter, the lender, the borrower and the importer. Hence, defining effective corporate strategy based on understanding customer needs is a significant challenge. SACE's approach to customer relations and the importance of effective distribution channels will also be covered.

COURSE OBJECTIVES

To provide a clear understanding of the relationship management between an ECA and its customers, participants will be introduced to SACE's customer relationship management approach and methodology.

The participants will be able to:

- Strategically align organizational structures to build profitable customer relationships whilst enhancing
- Cross-selling across all different business lines
- Develop and implement a more "customer-centric" organization as an integral part of corporate strategy
- Develop creative solutions for existing customers and pursue new customer acquisition opportunities
- Make communications efficient and improve customer service
- Monitor and report results using a customer-oriented approach

TUITION

Tuition will be provided by highly qualified professionals, with proven experience and comprehensive knowledge of the relevant fields. The course may be customized to meet the real needs of participants.

LOCATION

Upon request, at client's premises or in SACE's Rome office.

TOPICS

The Customer

- Definition of an ECA customer
- Understanding customer needs
- Satisfying customer expectations

Main features of two approaches: transaction driven vs customer oriented

- Analysis of the different strategies
- Transaction-driven approach
- Customer-oriented approach
- Evolution of the commercial model at SACE

Customer approach

- CRM philosophy
- Building effective and profitable long-term relationships with customers
- Implementing a solid and successful CRM system
- Focusing on key professional profiles in a transaction
- Cross selling and monitoring results

Distribution channel strategies

- Proximity to customers: the importance of a network
 - Global Relationship Manager
 - Domestic network
 - International network
- Simplified processes – SACE online
 - ExportPlus – the online platform
 - Online products and services
- Knowledge and expertise: advisory services
- SACE's marketing strategy

Managing Customer Satisfaction

- Customer satisfaction and loyalty
- Linking satisfaction to business results
- Customer satisfaction survey

We are

SACE is a leading provider of financial solutions, supported by a range of trade finance, political and credit risk insurance as well as financial guarantees. With over € 87 billion of outstanding commitments, we serve more than 25,000 business customers, facilitating access to commercial & bank financing in 198 countries worldwide. Since 2004 we have been providing advisory services, consultancy and training on topics relevant to ECA's activities, financial and multilateral institutions and sharing best practices and know-how to enhance mutual understanding and cooperation.

Beyond traditional advisory services

We believe that sharing best practices and know-how enhances mutual understanding and facilitates cooperation amongst players active in trade finance. Our training services cover a variety of areas and topics and are provided by highly qualified professionals and executives at client premises or in SACE's Rome office. Advisory services are offered through various modalities in order to meet the respective needs of the counterparties, namely:



standardised formulas of workshops on specific topics



tailor-made advisory and assistance for new business/product/activity development



consultancy on the set-up of ECAs, including assistance to governments and supervisory authorities

Other training modules you could be interested in

- Corporate and Bank Risk Assessment
- Country Risk Analysis
- Risk Management and Monitoring
- International Regulation for Export Credit
- Project Finance
- Export Credit & Credit Insurance
- Environmental Impact Assessment
- Governance, Corporate Strategy, CSR and Internal Auditing
- Factoring and Trade Finance

Among our customers



КазЭкспортГарант

KECIC

2006
Kazakhstan



EXIM
THAILAND

THAIEXIM

2006
Thailand



Expert Guarantee Fund Of Iran

EGFI

2007, 2008, 2011
Iran



HBOR

HBOR

2008, 2012
Croatia



EXIAR
EXPORT INSURANCE
AGENCY OF RUSSIA

EXIAR

2011, 2013
Russia



iciec

ICIEC

2009, 2013, 2014
Saudi Arabia



المؤسسة العربية لضمان
الاستثمار واتتمان الصادرات
The Arab Investment & Export
Credit Guarantee Corporation

DHAMAN

2014
Kuwait



BANCOMEXT
Banca de Desarrollo

BANCOMEXT

2015
Mexico



белагпропбанк

BELAGROPROMBANK


2015
Belarus



PARTNERSHIP
FUND

PARTNERSHIP FUND


2015
Georgia



ECIC

ECIC

2015-2016
South Africa



TURK
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2016
Turkey

CONTACT US

For further inquiries about our advisory services and a tailored offer please visit www.sace.it or contact us

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