

# Training course on Customer Relationship Management

## THE MODULE'S HIGHLIGHTS

**CUSTOMER ORIENTATION**

**CRM SYSTEM**

**SALES, MARKETING, CUSTOMER CARE**

**CUSTOMER SATISFACTION STRATEGY**

# Customer relationship management

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## 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

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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 € 164 billion of outstanding commitments, we serve more than 37,000 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



taylor-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  
Customer Relationship Management

## Among our customers

### Capacity Building Projects

### Set-up & Modernizations

 Qatar Development Bank 2023, 2018 Qatar	 SAUDI EXIM BANK 2023, 2022 Saudi Arabia	 Export Bahrain 2022 Bahrain	 EKA Ukraine 2023, 2021 Ukraine	 DHAMAN 2021 - 2014 Kuwait	 ECIO 2021 - 2020 Greece
 ABGF 2019 Brazil	 HBOR 2019 - 2018 - 2015 - 2012 - 2008 Croatia	 ECIC 2019, 2015 South Africa	 KazakhExport 2019, 2015, 2006 Kazakhstan	 Indonesia Eximbank 2018 Indonesia	 ALTUM 2018 Latvia
 Ukreximbank 2018 Ukraine	 Turk Eximbank 2017 - 2015 Turkey	 Bancomext 2015 Mexico	 Beleximgarant 2014 Belarus	 ICIEC 2014, 2013, 2009 Saudi Arabia	 EximBank Romania 2014 - 2009 - 2008 - 2006 Romania

 ECG 2023-2022-2021 2020, Greece	 Saudi EximBank 2019-2018 Saudi Arabia
 Fund 2015 Georgia	 EXIAR 2011 - 2012 - 2013 Russia
 SMECA 2004-2005 Serbia and Montenegro	

## CONTACT US

For further inquiries about our advisory services and a tailored offer please visit [www.sace.it](http://www.sace.it) or contact us

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