

Course Outline

(A SIDC CPE approved course)

Title : Financial Services Profession and Customer Service: Building and Maintaining Relationships

Date : 15th August 2018

Venue : Moffett Training Centre, E-3-2 , Plaza Kelana Jaya, Jalan SS7/13 A, Kelana Jaya, 47301, Petaling Jaya, KL

CPE : 10 Points

Speaker : Dr Ch'ng Huck Khoon

Objectives

1. Explain the important of customer service in financial services industry
2. Develop strategies to build stronger relationship and handle difficult customers
3. Apply E-Commerce and M-Commerce in customer service
4. Discuss the important of Know Your Clients (KYC) and encourage customer loyalty
5. State the compliance requirements on AMLATFPUAA by Bank Negara Malaysia and Securities Commission

Time	Descriptions
9 : 00 - 10 : 30	Financial Services Industry and Customer Service <ul style="list-style-type: none">• Expectation of Quality Service• Enhanced Consumer Preparation• Growth of E-Commerce and M-Commerce• The Customer Service Environment• Financial Planning and Customer Service
10 : 30 - 10 : 45	Coffee Break
10 : 45 - 12 : 00	Customer Service and Behaviour <ul style="list-style-type: none">• Identifying Behavioural Styles• Building Stronger Relationship• Service Breakdowns and Service Recovery• Difficult Customers• Handling Emotions with the Emotion-Reducing Model• Strategies for Preventing Dissatisfaction and Problem Solving
12 : 00 - 13 : 00	Customer Service via Technology <ul style="list-style-type: none">• The Role of Technology in Customer Service• Technology Strategies• Case Study: How to Apply WeChat's Functions in Customer Service?
13 : 00 - 14 : 00	Lunch Break
14 : 00 - 15 : 30	Encouraging Customer Loyalty <ul style="list-style-type: none">• The Role of Trust• The Important of Know Your Client (KYC)• The Important of Customer Relationship Management (CRM)• Provider Characteristics Affecting Customer Loyalty• Making the Customer Number One• Enhancing Customer Satisfaction as a Strategy for Retaining Customers
15 : 30 - 15 : 45	Coffee Break
15 : 45 - 17 : 30	Regulatory Issues in Customer Service <ul style="list-style-type: none">• Personal Data Protection Act 2010• Anti-Money Laundering, Anti-Terrorism Financing and Proceeds of Unlawful Activities Act (AMLATFPUAA) 2001

TRAINING COURSE REGISTRATION FORM

COURSE TITLE	Financial Services Profession and Customer Service: Building and Maintaining Relationships
COURSE DATE	15th August 2018
VENUE	Moffett Training Centre, E-3-2 , Plaza Kelana Jaya, Jalan SS7/13 A, Kelana Jaya, 47301, Petaling Jaya
REGISTRATION	8.30AM - 9.00AM
TIME	9.00AM - 5.30PM
FEES	RM 348 for Banker, member of professional associations [early bird by 15 July 2018] RM 398 for Banker, member of professional associations RM 438 for Public [early bird by 15 July 2018] RM 498 for Public <i>Fees are inclusive of coffee breaks, lunch, program materials and a Certificate of Attendance</i>
SIDC CPE Points	10 (Ten)
Instructions	Complete this form and fax to 04-2299327 or email to cpeseminar@chkconsultancy.com.my
Payment Details	<ol style="list-style-type: none"> Cheque made payable to "CHK CONSULTANCY SDN BHD". Or bank in to MAYBANK A/C #. 557063320872 Scan and email bank in slip to cpeseminar@chkconsultancy.com.my or fax to 04-2299327
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FULL NAME	
DESIGNATION	
NEW NRIC/PASSPORT NO.	
EMAIL ADDRESS	
PHONE NO.	
MOBILE	
SC LICENCE / CMSRL NO.	
PROFESSIONAL ASSOCIATIONS MEMBERSHIP NO.	

ADMINISTRATOR DETAILS

COMPANY	
CONTACT PERSON	
EMAIL ADDRESS	
PHONE NO.	
FAX NO.	
BUSINESS POSTAL ADDRESS	