



CDC CONSULT
Advisory. Transformation.
Delivery Support

**2-DAY IN-PERSON
TRAINING / OPEN PROGRAMME**

HYBRID CLIENT RELATIONSHIP MANAGEMENT IN FINANCIAL SERVICES

**2-DAY
PRACTICAL
PROGRAMME
+ 30-day clinic**



Deliver seamless, trusted service across branch, mobile, call centre, agents and digital channels.

TRAINING DATE
11–12 August 2026

VENUE
TBC

DURATION
2 Days (In-Person)

INVESTMENT (FEE PER HEAD)	
1 PARTICIPANT	GHS 1,050
2 PARTICIPANTS (FROM THE SAME INSTITUTION)	GHS 1,800
3 PARTICIPANTS (FROM THE SAME INSTITUTION)	GHS 2,500

WHY THIS COURSE

Customers now judge a financial institution through its app, USSD, website and digital support. Yet they still need informed human help for onboarding, advice, failed transactions, fraud concerns and complaints.

Success depends on one relationship across every channel – not separate digital and branch experiences.

WHO SHOULD ATTEND

- Relationship and account managers
- Branch managers and front-office teams
- Client service and contact-centre staff
- Operations, digital banking and fintech teams
- CX, product, marketing and complaints teams
- Supervisors, coaches and training managers

WHAT PARTICIPANTS WILL LEARN

- Map client journeys and find service gaps
- Hold needs-led relationship conversations
- Manage smooth handovers and clear ownership
- Use CRM, data and AI with human judgement
- Resolve complaints and recover trust
- Support safe, inclusive digital adoption
- Measure service and lead team improvement

WHAT THE COURSE COVERS

- Ghana's changing client and hybrid service model
- Client psychology, segments and life stages
- Listening, questioning, empathy and advice
- Journey mapping and moments that matter
- Branch-digital-agent-contact-centre handovers
- Mobile, web, USSD, chat and assisted service
- CRM, customer data, AI and personalisation
- Complaints, recovery and consumer protection
- Trust, privacy, fraud and clear communication
- CX metrics, dashboards, coaching and action plans

HOW THE COURSE RUNS

- Pre-course service diagnostic
- Ghana-focused cases and service failures
- Branch, call-centre and digital role plays
- Client-journey mapping lab
- Cross-channel handover simulation
- Complaint and service-recovery clinic
- 30-day workplace action plan
- Post-course virtual implementation clinic

WHAT MAKES IT DIFFERENT

- Combines human service, digital experience, consumer protection and performance
- Built for Ghanaian financial institutions
- Uses practical tools, not lecture-only delivery
- Applies to banks, community banks, S&Ls, MFIs, fintechs and PSPs

DELIVERY OPTIONS

- 2-day open programme
- 2–3-day tailored in-house programme
- 1-day executive masterclass
- Five half-day virtual sessions
- Optional coaching and mystery-client review

WHAT YOUR INSTITUTION GAINS

- Consistent service across channels
- Faster ownership and resolution
- Better digital adoption and trust
- Fewer repeat contacts and complaints
- Stronger retention and referrals
- Clear CX measures and coaching actions

ENROLMENT & CONTACT To enrol, please send participants' details to Edinam via: fst@cdccconsult.org

Open enrolment public cohort available

CONTACT
Financial Sector Training (FST)
CDC Consult

fst@cdccconsult.org
www.cdccconsult.org
Accra, Ghana

**Transforming Businesses
Impacting Communities**
CDC GROUP