

Programme Objectives & Outlines

Programme	Outlines
Regulations, Data Privacy and Tools for Wealth Management (Ref. #: 80/74/31)	
Insurance Regulations on Sales Compliance (HD000000P190811)	2 hours <ul style="list-style-type: none"> New Regulatory Landscape for Insurance Intermediaries Latest Regulations and Industry Practices for Insurance intermediaries New Regulation and Code of Practices by IA Compliance with the Regulatory Requirements in Sale of Insurance Policies Insurance Regulations for Front Line, Middle Office, and Black Office Enforcement Cases Studies and Discussions
Premium Financing (HD000000P190812)	2 hours <ul style="list-style-type: none"> Introduction to Premium Financing How does Premium Financing work? Pros and Cons of Premium Financing Risks Involved in Premium Financing Wealth Management using Premium Financing
Wealth Succession & Trust (HD000000P190813)	2 Hours <ul style="list-style-type: none"> Wealth Succession planning Intestates' Estates Ordinance vs. Wills Ordinance Characteristics and Types of Trusts Pros and Cons of Using a Trust Putting Trust in Practices
Data Privacy for Bank Staff (HD000000P190814)	2 Hours <ul style="list-style-type: none"> Major Provisions in the Personal data (Privacy) Ordinance (i.e. PDPO) Regulation of Customer Data Handling for Bank Staff Provisions of the Use of Personal Data in Direct marketing Customer's Right of Consent and Opt-out Past Violations of Law in the banking Sector Case Scenarios and Principles for Front Line, Middle Office, and Black Office
Banking Services and Professional Ethics (Ref. #: 80/74/24)	
Business Ethical & Internal Control (HD000000P190905)	2 Hours <ul style="list-style-type: none"> Business Ethical <ul style="list-style-type: none"> Corporate Governance <ul style="list-style-type: none"> Stakeholders Ethical Issues Reporting Internal Control <ul style="list-style-type: none"> Laws Regarding Financial Services Using Codes of Practice Internal Controls & Audits
Corporate and Individual Ethics (HD000000P190906)	3 Hours <ul style="list-style-type: none"> What are Ethics Putting Ethics into Practice Individually Social & Environmental Responsibilities Reputation Risk management Ethical Dilemmas
Treasury and Banking Operations (HD000000P190907)	3 Hours <ul style="list-style-type: none"> Asset & Liability Management Treasury Operations <ul style="list-style-type: none"> Financial Market Money Market Exchange Fund Bills Interest rate Market Labor and Hibor Interest rate Risk management Currency Products Investment Management Equity financing & Equity Margin Trading

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Programme	Outline
Strive for Communication Excellence (Ref. #: 80/74/26)	
<p>Innovative Leadership for Extensive Branding & Interpersonal Influencing (HD000000P191001)</p> <p style="text-align: right; background-color: yellow;">3 Hours</p>	<ul style="list-style-type: none"> ■ Introduction <ul style="list-style-type: none"> ■ Understand where is Innovation & Creativity come from? ■ Innovative Mindset ■ Introduction of innovation Process, Collective Mindset and Transformation Techniques ■ Overcoming Major Barriers <ul style="list-style-type: none"> ■ Mindset vs. fear of Changes ■ Attitudes/Mindset of Management ■ Innovative management ■ Developing Innovative Structure ■ Key Sustainable Innovation Factors <ul style="list-style-type: none"> ■ Chinese Innovation Wisdom
<p>Master the Invisible Forces for Professional Consultative Selling (HD000000P191002)</p> <p style="text-align: right; background-color: yellow;">2 Hours</p>	<ul style="list-style-type: none"> ■ Branding works for Business <ul style="list-style-type: none"> ■ From personal to competitive corporate levels ■ Branding & Mindset ■ Find out What Customer Wants <ul style="list-style-type: none"> ■ Customer-centric Model ■ Hidden Language ■ Self-Image to Professionalism and Mindset <ul style="list-style-type: none"> ■ Integrity & Professionalism ■ Mindset defines Images ■ Bypass Mental Paradigm to Shifts Objections and Resistances <ul style="list-style-type: none"> ■ Tactics on Professional Selling Process Handling ■ Handling Rejecting Approaches ■ Transforming Resistances into Loyalty
<p>Customer-centric Mindset for Professional Services (HD000000P191003)</p> <p style="text-align: right; background-color: yellow;">3 Hours</p>	<ul style="list-style-type: none"> ■ Introduction <ul style="list-style-type: none"> ■ Integrity of Branding and Professional Services ■ What is Branding? ■ Attributes to Branding ■ Customer-centric Mindset <ul style="list-style-type: none"> ■ Roles of Bankers ■ On-Demanding Web-based Centennium ■ Thinking under the Customer's hat ■ Identify risks and opportunities through viable platforms, tools and signs <ul style="list-style-type: none"> ■ Customer Expectation ■ Perceptions formed during Interactions ■ Magic Words ■ Verbal and Non-verbal Reflections <ul style="list-style-type: none"> ■ Recognise Signs ■ Critical Successful Factors ■ Applying Total Customer-centric approaches
<p>Winning Solution through the Voice of Customer (HD000000P191004)</p> <p style="text-align: right; background-color: yellow;">2 Hours</p>	<ul style="list-style-type: none"> ■ Voice of customers <ul style="list-style-type: none"> ■ What is Voice of Customers ■ Translate VoC into Customer Critical Requirements ■ Prioritize Customer Critical Requirements ■ Voice of competitors <ul style="list-style-type: none"> ■ Industry Benchmarking ■ Competitive Benchmarking ■ Identifying business opportunities from building your own edge to meet customer demand <ul style="list-style-type: none"> ■ SWOT Analysis

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Programme	Outline
Turning the Customer Complaint into Business Opportunities (HD000000P191005) <div style="float: right; background-color: #FFD700; padding: 2px;">3 Hours</div>	<ul style="list-style-type: none"> ■ Service Model <ul style="list-style-type: none"> ■ Ordinary vs New View of Complaint ■ Service Quality Gap Model ■ Complaint Handling Framework and Techniques <ul style="list-style-type: none"> ■ Complaint Handling Framework - 3As Model ■ How to deliver negative message ■ Turning Complaints into Business Opportunities <ul style="list-style-type: none"> ■ Turning Complaints into Business Opportunities - EAST Model
Identifying the Cross Selling & Referral Opportunities (HD000000P191006) <div style="float: right; background-color: #FFD700; padding: 2px;">3 Hours</div>	<ul style="list-style-type: none"> ■ Understanding of customer progressive needs <ul style="list-style-type: none"> ■ Key Elements of Cross Sell ■ Benefits of Cross Sell ■ Success Factors ■ Product fit to progressive needs <ul style="list-style-type: none"> ■ Types of Product ■ Progressive Product Needs ■ Skills & techniques on identifying cross selling & referral opportunities <ul style="list-style-type: none"> ■ Cross Sell / Referral Model - APPLE
Consultative Selling Skills / 顧問式銷售技巧工作坊 (HD000000P191007) <div style="float: right; background-color: #FFD700; padding: 2px;">4 Hours</div>	<ul style="list-style-type: none"> ■ Preparation of Selling/營銷預備 <ul style="list-style-type: none"> ■ 心態準備/ Attitude ■ 技巧準備/ Skill ■ 知識準備/ Knowledge ■ Telephone Selling/電話銷售 <ul style="list-style-type: none"> ■ 規劃銷售活動 ■ 尋找客源 ■ Consultative Selling Process/顧問式銷售的流程及技巧 <ul style="list-style-type: none"> ■ 打開話題, 建立關係 ■ 了解需求 ■ 提供方案 ■ Objection Handling/面對異議 <ul style="list-style-type: none"> ■ 處理異議 (Objection Handling) ■ 異議的形式 ■ 處理異議四步曲 ■ Cross Selling/交叉銷售 <ul style="list-style-type: none"> ■ 銷售的契機 ■ Getting referrals/獲取轉介 <ul style="list-style-type: none"> ■ 銷售圈中搜集資料
Effective Coaching Techniques at Workplace / 績效指導技巧工作坊 (HD000000P191008) <div style="float: right; background-color: #FFD700; padding: 2px;">4 Hours</div>	<ul style="list-style-type: none"> ■ About Coaching <ul style="list-style-type: none"> ■ What is Performance? ■ 表現的差異/ Variance of Performance ■ 前線團隊績效管理週期/ Effective Management Cycle for Frontline Team Roles of Coach ■ Roles of Coach ■ Coaching Process/Model <ul style="list-style-type: none"> ■ 5 Steps of Coaching Model ■ Step 1: Monitor employee performance ■ Step 2: Diagnose performance improvement areas ■ Step 3: Provide constructive/corrective/positive feedback ■ Step 4: Derive and commit an action plan ■ Step 5: Appraise learning



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August – October 2019

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Programme Details

Language : Cantonese (supplemented with English materials)
Date : August – October 2019
E-mail : programme@hkib.org
Enquiry Hotline : (852) 2190 7060 / (852) 2153 7800
Enrolment : By fax at (852) 2682 0218 / In person to our Institute

Venue : 3/F Guangdong Investment Tower, 148 Connaught Road Central (Sheung Wan MTR Station Exit C)
Special Offer : **Enroll 2 or more programmes in one time, enjoy a 10% discount off**

Registration Form

		Programmes	Time	Course Fees (Regular Price/ Discount Price)
Regulations, Data Privacy and Tools for Wealth Management (Ref. #: 80/74/31)	<input type="checkbox"/>	Insurance Regulations on Sales Compliance (HD000000P190811)	2 Hours 13 Aug 2019 (Tue) 7:00pm – 9:00pm	Programme Price by Training Hour <input type="checkbox"/> Individual Member ____ Training Hour(s) x HKD300 = HKD ____ <input type="checkbox"/> Staff of Corporate Member ____ Training Hour(s) x HKD360 = HKD ____ <input type="checkbox"/> Non-member ____ Training Hour(s) x HKD400 = HKD ____ Enroll 2 or more Programmes ***Discount Price <input type="checkbox"/> Individual Member ____ Training Hour(s) x HKD270 = HKD ____ <input type="checkbox"/> Staff of Corporate Member ____ Training Hour(s) x HKD324 = HKD ____ <input type="checkbox"/> Non-member ____ Training Hour(s) x HKD360 = HKD ____
	<input type="checkbox"/>	Premium Financing (HD000000P190812)	2 Hours 15 Aug 2019 (Thu) 7:00pm – 9:00pm	
	<input type="checkbox"/>	Wealth Succession & Trust (HD000000P190813)	2 Hours 27 Aug 2019 (Tue) 7:00pm – 9:00pm	
	<input type="checkbox"/>	Data Privacy for Bank Staff (HD000000P190814)	2 Hours 28 Aug 2019 (Wed) 7:00pm – 9:00pm	
Banking Services and Professional Ethics (Ref. #: 80/74/24)	<input type="checkbox"/>	Business Ethical & Internal Control (HD000000P190905)	2 Hours 7 Sep 2019 (Sat) 10:00am – 12:00pm	
	<input type="checkbox"/>	Corporate and Individual Ethics (HD000000P190906)	3 Hours 7 Sep 2019 (Sat) 2:00pm – 5:00pm	
	<input type="checkbox"/>	Treasury and Banking Operations (HD000000P190907)	3 Hours 9 Sep 2019 (Mon) 7:00pm – 10:00pm	
Strive for Communication Excellence (Ref. #: 80/74/26)	<input type="checkbox"/>	Innovative Leadership for Extensive Branding & Interpersonal Influencing (HD000000P191001)	3 Hours 3 Oct 2019 (Thu) 7:00pm – 10:00pm	
	<input type="checkbox"/>	Master the Invisible Forces for Professional Consultative Selling (HD000000P191002)	2 Hours 5 Oct 2019 (Sat) 10:00am – 12:00pm	
	<input type="checkbox"/>	Customer-centric Mindset for Professional Services (HD000000P191003)	3 Hours 5 Oct 2019 (Sat) 2:00pm – 5:00pm	
	<input type="checkbox"/>	Winning Solution through the Voice of Customer (HD000000P191004)	2 Hours 10 Oct 2019 (Thu) 7:00pm – 9:00pm	
	<input type="checkbox"/>	Turning the Customer Complaint into Business Opportunities (HD000000P191005)	3 Hours 12 Oct 2019 (Sat) 10:00am – 1:00pm	
	<input type="checkbox"/>	Identifying the Cross Selling & Referral Opportunities (HD000000P191006)	3 Hours 12 Oct 2019 (Sat) 2:00pm – 5:00pm	
	<input type="checkbox"/>	Consultative Selling Skills / 顧問式銷售技巧工作坊 (HD000000P191007)	4 Hours 14 Oct 2019 (Mon) 7:00pm – 9:00pm 16 Oct 2019 (Wed) 7:00pm – 9:00pm	
	<input type="checkbox"/>	Effective Coaching Techniques at Workplace / 績效指導技巧工作坊 (HD000000P191008)	4 Hours 21 Oct 2019 (Mon) 7:00pm – 9:00pm 25 Oct 2019 (Fri) 7:00pm – 9:00pm	



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Full Name : Mr / Ms _____ (In English as on ID Card) Full Name : _____ (In Chinese)

Membership No : _____ Organisation : _____

Department : _____ Position : _____

E-mail : _____ Mobile / Phone No : _____

(Confirmation will be sent via e-mail one week before programme commences)

Mailing Address : _____
(Please provide a mailing address if you want to collect the programme certificate)

Payment Method : Crossed cheque made payable to **The Hong Kong Institute of Bankers** (Cheque no.: _____)
* For e-Cheque, please state the **programme code** under 'remarks' and email together with the **completed enrolment form** to **programme@hkib.org**

Credit Card : VISA Master Amount : HKD _____

Cardholder's Name : _____ Signature : _____

Card No. : _____ Expiry Date : _____ (mm/yy)

How did you know about this programme?

Website HR Department E-News Others (Please specify) _____

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Terms and Conditions

- All fees paid are non-refundable and non-transferrable.
- Participants who have settled payments will receive course confirmation by e-mail within 7 days prior to the programme date.
- All payments must be settled before programme commencement.
- Priority of enrolment will be given on a "first-come-first-serve" basis. HKIB Member will have priority in registration for those programmes with limited seats.
- HKIB would issue the "Certificate of Attendance" to participants who have complied with the "HKIB Attendance Policy". The Certificate will be mailed to the corresponding address within 10 working days after completion of the programme.
- We reserve the right to reject an enrolment at any time.
- We reserve the right to cancel, modify and/or postpone the programme due to unforeseen circumstances.
- The information given and personal data collected will be used for the purpose of administration and communication by the Institute.
- For the Typhoon or Rainstorm arrangement, please refer to the confirmation e-mail or HKIB's website (www.hkib.org).



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