

FACT SHEET

Professional Development Session

How to Develop an Effective Client Retention Program



The National Finance Institute



This professional development session must be combined with others to create a customised half-day session.

What does the course cover?

Do you seem to be “chasing your tail?” You conduct some great lead generation marketing, work really hard to gain approvals and ensure settlements only to find yourself having to do the same legwork next month. Sound familiar?

The solution is an effective client retention program that results in more repeat and referral business. This session will take you through a step-by-step process to establish a client retention program that aims to build up your trail commission and increase repeat business. It considers costs, privacy issues, touchpoints and databases. You will discover how to walk the thin-line between “delightful after-sales service” and “annoying the client.”

Any mortgage broker that is serious about being successful in the long-haul should attend this session.

- Find out why client retention programs are the most profitable form of marketing
- Discover a host of unique ideas for keeping in contact with your past clients
- How to segment your client database to ensure you are not losing money to keep clients
- Learn a few ‘essential’ client retention activities that every mortgage professional should be conducting without fail.

Are there any CPD points available for this session?

This session has been designed to contribute toward the Mortgage Industry Association of Australia’s (MIAA) continuing professional development (CPD) requirements. The CPD points allocated, for each session may vary according to the level of technical knowledge involved. As an indication, mortgage industry related educational workshops are allocated 3 points per day or 1.5 points per session. However, these courses shouldn’t be considered a ‘point accumulation exercise’, but rather a means to create a competitive edge over your rivals.

What happens if I attend, but don’t gain any benefit?

If you attend an NFI professional development course and for any reason it does not prove to be an experience that can help you establish, or greatly improve, your career as a mortgage professional, you will receive a 100% refund upon request at the completion of the course. We make this guarantee because we believe 100% in the results our courses deliver.

Who has this session been developed for?

This session has been developed for new and experienced mortgage brokers. It is also particularly relevant to managers and support staff of aggregation, franchise and other large mortgage companies.

How long will this course take to complete?

This session is two hours duration. It is to be combined with other available sessions to make a half-day training course.

When are the courses scheduled?

Courses can be conducted to suit your schedule. We can arrange a venue or it can be held at your training room. We require 20 participants to conduct a course.

What materials/equipment do I need?

A workbook is supplied at the commencement of the course. You only need to bring a pen.

How much does a professional development course cost?

Prices range from \$115 to \$225 per person.

What will I receive?

You will receive a course workbook and Certificate of Attendance.

When does the course start and finish each day?

Courses generally start at either 9am or 1pm, depending on the time constraints of the group.

What should I wear to the training and what is the arrangement for lunch?

Smart casual is expected as a minimum dress standard by all students. You are responsible for organising your own lunch unless notified otherwise.

How do I arrange a course?

Please call Client Services on 1300 765 400 – we’d be delighted to hear from you.

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