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Course Name

Banking Relationship Economics

Sector Name

Finance, Accounting and Banking

Document Type

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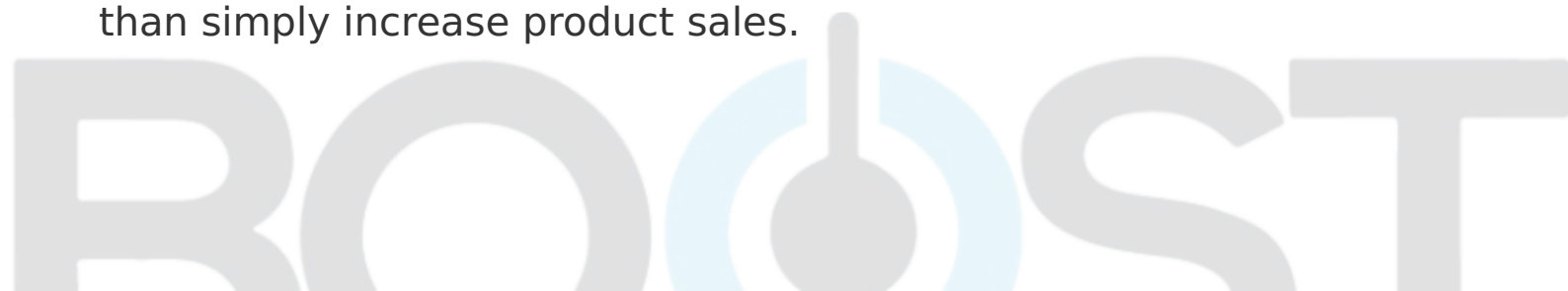


Banking Relationship Economics

Course Introduction

A banking relationship cannot be understood fully by looking at individual products in isolation. A customer may generate attractive revenue through one facility while requiring intensive service elsewhere, maintain significant balances but use capital inefficiently, or appear profitable today while the economics of the relationship are gradually weakening. Product-level performance can therefore hide the combined effect of **revenue, funding behavior, utilization, servicing effort, risk and resource consumption across the complete relationship.**

BOOST Consulting & Training presents **Banking Relationship Economics**, a practical program designed to help participants evaluate the economic strength of a banking relationship as an interconnected portfolio rather than a collection of separate products. The course develops the ability to map value creation and value consumption across the relationship, examine customer behavior and resource usage, assess risk-adjusted economics, identify underdeveloped or economically weak relationships, and design actions that strengthen sustainable relationship value rather than simply increase product sales.



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Banking Relationship Economics

Target Audience

Relationship managers, corporate and commercial banking professionals, banking finance and profitability teams, product managers, and professionals supporting customer portfolio decisions.

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Banking Relationship Economics

Learning Objectives

- ✓ Evaluate banking relationships beyond individual product revenue.
- ✓ Identify where value is created and consumed across the relationship.
- ✓ Analyze the effect of balances, utilization, servicing effort and customer behavior.
- ✓ Incorporate risk and resource consumption into relationship economics.
- ✓ Distinguish high-revenue relationships from economically strong relationships.
- ✓ Identify opportunities to improve the quality and sustainability of relationship value.
- ✓ Build a structured approach for managing relationship economics over time.

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Banking Relationship Economics

Course Outline

✓ Day 01

Seeing the Whole Banking Relationship

Moving Beyond Product-Level Performance

- ✓ Distinguishing product profitability from total relationship economics
- ✓ Mapping facilities, deposits, transactions and services around the customer
- ✓ Identifying financial and non-financial resources consumed across the relationship

Building the Relationship Economics Map

- ✓ Tracing revenue, funding contribution, fees and other sources of economic value
- ✓ Identifying service, processing and relationship-management effort
- ✓ Creating an integrated view of how the relationship generates and consumes value

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Banking Relationship Economics

Course Outline

✓ Day 02

Understanding What Drives Relationship Economics

Reading Customer Financial Behavior

- ✓ Examining balances, utilization and transaction behavior across the relationship
- ✓ Identifying patterns that strengthen or weaken economic contribution
- ✓ Understanding how changing customer activity alters relationship economics

Revealing the Cost to Serve

- ✓ Identifying service intensity, exceptions and non-standard support
- ✓ Examining the economics of high touch versus scalable servicing
- ✓ Detecting hidden resource consumption not visible in product revenue

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Course Outline

✓ Day 03

Integrating Risk and Resource Consumption

Looking Beyond Gross Revenue

- ✓ Examining how credit and relationship risk affect economic attractiveness
- ✓ Considering capital and liquidity implications within relationship decisions
- ✓ Distinguishing revenue growth from sustainable economic contribution

Testing Relationship Quality

- ✓ Comparing relationships with similar revenue but different economic characteristics
- ✓ Identifying concentration or dependency that weakens relationship quality
- ✓ Building a multidimensional view of relationship strength

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Course Outline

✓ Day 04

Improving Relationship Economics

Identifying Value Development Opportunities

- ✓ Detecting underutilized capabilities within an existing relationship
- ✓ Aligning services with genuine customer activity and financial needs
- ✓ Identifying opportunities that improve both customer relevance and relationship economics

Repairing Economically Weak Relationships

- ✓ Diagnosing whether weakness comes from pricing, utilization, servicing or relationship structure
- ✓ Comparing repricing, restructuring, service redesign and relationship-development options
- ✓ Avoiding actions that improve short-term revenue while weakening long-term relationship quality

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Course Outline

✓ Day 05

Managing Sustainable Relationship Value

Monitoring Relationship Economics Over Time

- ✓ Identifying changes that indicate strengthening or deterioration
- ✓ Reviewing economics as customer behavior and risk conditions evolve
- ✓ Establishing triggers for relationship review and corrective action

Banking Relationship Economics Lab

- ✓ Analyzing a portfolio of customers with contrasting economic profiles
- ✓ Diagnosing value creation, resource consumption and relationship weaknesses
- ✓ Developing a Relationship Economics Action Plan for selected customer relationships

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 28, 2026	Jan. 1, 2027	5 days	4250.00 \$	UAE , Dubai

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