



SCHOOL OF EXECUTIVE EDUCATION
AND LIFELONG LEARNING

FT EXECUTIVE
EDUCATION
2026 RANKING

Banking Relationship Management Excellence



PROGRAM OVERVIEW

Relationship Managers operate in an increasingly complex environment that requires balancing business growth, client relationship management, and risk discipline.

In today's financial services landscape, Relationship Managers must build and sustain strong client relationships across segments, apply sound credit judgment and risk assessment frameworks, monitor and manage portfolio performance proactively, and deliver value-based solutions through cross-selling and advisory

This program develops Relationship Managers into well-rounded professionals who can integrate relationship management, credit discipline, and sales effectiveness to drive sustainable business performance.

PROGRAM OBJECTIVES

At the end of the program, the participants should be able to:

1. Strengthen strategic relationship management and client engagement
2. Build robust credit evaluation and risk assessment capabilities
3. Enhance portfolio monitoring and early risk detection skills
4. Improve cross-selling and client solutioning capabilities
5. Strengthen sales, negotiation, and coaching effectiveness
6. Apply integrated learning in real-world relationship management scenarios



FOR INQUIRIES:

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WHAT WILL YOU LEARN

Session 1

Strategic
Stakeholder
Management

Session 2

Customer
Relationship Part 1

Session 3

Customer
Relationship Part 2

Session 4

Emotional
Intelligence in
Client Engagement
Part 1

Session 5

Emotional
Intelligence in
Client Engagement
Part 2

Session 6

Managing
Interpersonal
Dynamics

Session 7

Financial Statement
Analysis

Session 8

Financial Statement
Analysis

Session 9

Creditworthiness
Assessment

Session 10

Credit Evaluation
Frameworks

Session 11

Borrower Risk
Assessment

Session 12

Borrower Risk
Assessment

Session 13

5C's of Credit

Session 14

Lending Decision-
Making

Session 15

Credit Lifecycle
Management

Session 16

Risk-Based
Decision-Making

Session 17

Portfolio Monitoring

Session 18

Risk Analysis &
Stress Testing

Session 19

Credit Application
Analysis

Session 20

Regulatory
Compliance

Session 21

Product
Knowledge &
Financial Solutions

Session 22

Customer Needs
Analysis

Session 23

Cross-selling
Strategies

Session 24

Sales & Negotiation

Session 25

Coaching for
Performance

Session 26

Product Knowledge & Financial Institutions

Session 27

Action Learning Project Presentation

FOR INQUIRIES:



KEY BENEFITS

The 26 half days will cover the following topics:

- Client ecosystems, influence mapping
- Management, Trust building, engagement strategies
- Empathy, self-awareness
- Conflict, influence
- Income, balance sheet, cash flow
- Ratios, cash flow adequacy
- Scoring models, rating systems
- Risk profiling
- Character, capacity, capital, collateral, conditions
- Credit discipline, approval logic
- Origination to approval
- Default risk, financial health
- Delinquency, migration trends
- Scenario analysis
- Financial documents, borrower capacity
- AML (Anti-Money Laundering), BSP (Bangko Sentral ng Pilipinas) standards
- Banking + subsidiaries
- Identifying client requirements
- Product bundling
- Persuasion, closing
- Feedback, development
- Banking + subsidiaries



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WHO SHOULD ATTEND

- Relationship Managers (Corporate Banking Group and Commercial Banking Group)
- Junior to mid-level RMs

PROGRAM FACULTY



Alberto G. Mateo, Jr.

Program Director

Alberto G. Mateo, Jr. is a seasoned business leader, educator, and certified coach. He earned his coaching certification from the NeuroLeadership Institute and is currently a practicing executive coach. Professor Mateo brings with him thirty-four years of progressive experience in the fields of general management, finance, human resources, and management education with multinational sales organizations and academic institutions. He is currently the Head of the School of Executive Education and Lifelong Learning at the Asian Institute of Management. Before joining AIM, he was the President and Managing Director of HP Inc. and Pfizer, Inc. in the Philippines.



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Earning a SEELL Postgraduate Certificate and Diploma

SEELL offers Postgraduate Stackable Certificate Courses in various areas of concentration and discipline, which build an individual's qualifications and distinguish their professional value. It enables professionals to develop their proficiency in diverse areas of concentration in a personalized and more manageable manner.

By successfully completing SEELL's programs, credentials can be earned over time, stacked towards earning a Postgraduate Certificate in an area of their choice, and ultimately, a Postgraduate Diploma in Management. This leads to more career opportunities, advancement, and potentially high-paying jobs.

EARNING CREDENTIALS

Successfully completing the program earns participants **five (5) units** which can be credited to the following:

- Postgraduate Certificate in Administration
*Postgraduate Certificates require five (5) units earned within two (2) years.
- Participants will also earn **two (2) units** which can be credited to the Postgraduate Diploma in Management.

*The Postgraduate Diploma in Management requires a total of twenty (20) units earned within three (3) years.

ELIGIBLE PROGRAMS

For guidance on other eligible programs for Postgraduate Certificates and designing your learning journey with SEELL, please email us at SEELL@aim.edu or visit our website at <https://executiveeducation.aim.edu>



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