



CENTRAL BANK OF EGYPT
Egyptian Banking Institute



Chartered
Banker



Implemented by
giz
Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH



Clients and Customers

Course Hours: 8 Hours

20th of September, 2023

Target Audience:

This course is mainly for middle and senior managers who work in in Sustainability and Corporate Banking Department, to help (as a banker) their customers on this journey.

Course Objective:

1. Explain the triple planetary crisis of climate change, biodiversity loss and pollution.
2. Recognize the role of Relationship managers in supporting their clients and customers to integrate sustainability in their businesses to achieve the UN SDGs and the Paris Climate Agreement.
3. Describe and explain the purpose of the PRB as a framework to support the transition of clients and customers to a more sustainable world.
4. Understand the importance of adopting a dialogue-based approach to better understand clients' businesses, build trust and support their successful sustainability transitions.
5. Explore models and tools that can be used to support clients to develop and achieve their sustainability goals.
6. Explain the different sustainable banking solutions available to clients and customers, and discuss how they can be applied responsible banking in practice.

Course Outline:

1. Review a range of influences on the sustainability strategy of banks.
2. Consider the UN Principles for Responsible Banking and the Sustainable Development Goals and their effect on how banks serve customers.
3. Investigate the role of relationship management in a responsible banking context, with a specific focus on supporting business customers in the transition to low carbon activities.
4. Describe a range of practical models, tools and techniques bankers can use, or recommend, to support their clients in achieving their goals and objectives and how this client activity is recorded in bank portfolios.
5. Adopt a dialogue-based approach to better understand a client's business, build trust, and identify their funding needs.
6. Recommend appropriate options to support client needs.

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Headquarters – Nasr City
22 A, Dr. Anwar El Mofty St., Tiba 2000
P.O.Box 8164 Nasr City, Cairo, Egypt
Tel.: (+2) 02 24054472
Fax: (+2) 02 24054471

Working hours: 9:00 am - 5:00 pm
www.ebi.gov.eg

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