

## **TERMS OF REFERENCE**

### **PROVISION OF TRAINING FOR PREMIUM BANKING RELATIONSHIP MANAGERS (HIGH NET WORTH) AT KCB BANK-KENYA**

#### **1. BACKGROUND**

KCB Kenya (KCBK) is a commercial bank regulated by the Central Bank of Kenya. We are part of the KCB Group. The Bank was established 128 years ago and prides itself in the impact it continues to make in the lives of Kenyans and the Kenyan economy in general. The Bank operates subsidiaries in East African countries including Tanzania, Uganda, Rwanda, South Sudan, Burundi and DRC Congo.

In view of our purpose: For People. For Better, the Bank aims at building capacity within the High-Net-worth Relationship Managers within the branch network.

#### **2. OBJECTIVES OF THE PROGRAM**

KCBK is seeking an experienced service provider to build capability and competencies of their Premium Relationship Managers who handle High Net-worth clients for the Bank.

##### **Learning objectives**

1. Provide participants with training on Relationship & Portfolio Management for High-Net-Worth clients.
2. Train participants to recognize the role of Business Acumen and Commercial Awareness to enable address customer needs and expectations.
3. Provide participants with key concepts on how to manage High Net Worth Customer Excellence Relationships and Networking Skills.
4. Equip Premium Relationship Managers with Effective Business Communication & Personal Etiquette skills to assist navigate various business interactions and maintain professionalism.
5. Provide participants with essential Negotiation Skills and Stakeholder Management, to enable them to understand and address stakeholder needs while developing strong negotiation skills for win-win solutions.

##### **a. Training Delivery.**

1. Physical Training (KCB Leadership Centre)
2. E-learning Courses

##### **b. Training Evaluation**

Evaluation to be carried as stated below.

- Level 1 - Reaction
- Level 2 –Learning
- Level 3 –Behavior
- Level 4 –Results (ROI)

#### **3. SCOPE OF WORK**

Develop a robust program for Premium Relationship Managers.

#### 4. TARGET AUDIENCE

The training is for KCB Kenya.

Find the target number below.

Target Audience	Approx. Numbers
Premium Relationship Managers	50

#### 5. TRAINING VENUE

The training will be conducted through Physical training at KCB Leadership Centre and e-learning.

#### 6. TECHNICAL PROPOSAL

The Technical proposal shall include the following:

- Company Profile and specify whether the company is a sole proprietorship, partnership or registered company.
- Specify number of years the organization has been carrying out training in the specified area (attach evidence).
- Detailed understanding of the scope of training.
- Documentary evidence (if any) of accreditation certification/license to offer instructional design and/or training facilitation skills training.
- Proposed approach and methodology of executing the training; and where possible the post training support.
- Proposed timeframe for conducting the training.
- Provide a list of tools/materials that will be used in training.
- Curriculum vitae of the proposed trainers citing relevant experience in conducting similar training.
- At least three references where similar training has been conducted in a financial institution/ large organization/ listed companies of similar size within the last three years.
- If it's a local company, National Industrial Training Authority (NITA) Certification is required.
- Shortlisted suppliers will be invited to make presentations of their proposed methodologies.

#### 7. FINANCIAL PROPOSAL

The financial proposal should include the cost of conducting the training for the number provided.

The training firm should indicate all the relevant taxes as part of the cost.

## **8. DEADLINE FOR SUBMISSION OF PROPOSALS**

The bid documents should be submitted in the KCB Sourcing Portal on or before 19<sup>th</sup> May 2025 at 3.00pm EAT.

Responses received in any other form will be rejected. Kindly comply.

Questions or clarifications can be directed to: [procurement@kcbgroup.com](mailto:procurement@kcbgroup.com).