

# ULTRA HIGH NET WORTH INDIVIDUAL CLIENT MANAGEMENT PROGRAM



10-12 June 2024



In-Person



IUM in Monaco



English Language



1,700€ + VAT

ELEVATE YOUR EXECUTIVE PROWESS AT THE APEX OF UHNWI CLIENT MANAGEMENT. UNLOCK THE SECRETS OF ULTRA HIGH NET WORTH INDIVIDUALS (UHNWI) WITH THE INTERNATIONAL UNIVERSITY OF MONACO'S EXCLUSIVE EXECUTIVE EDUCATION PROGRAM DESIGNED FOR TOP-TIER PROFESSIONALS.

## PROGRAM OVERVIEW

Our program is a sanctum where the elite of UHNWI client management executives converge to redefine the standards of bespoke services. Studded with insights from over 250 in-depth UHNWI interviews, this curriculum, led by the distinguished Prof. Dr. Phil Klaus, Top World 2% Scientist, offers a rich tapestry of strategies tailored to your high-caliber clientele. The focus is on understanding and actioning what matters most to UHNWIs to command market dominance, bolster revenues, elevate sales, and revolutionize client conversion while wisely cutting costs without compromise to service quality.

## WHO WILL BENEFIT

Senior executives and managers responsible for navigating the complex landscape of UHNWI client relations and strategy will immensely benefit from this targeted program.

## PROGRAM OBJECTIVES

- **Insight Generation:** Acquire deep understandings from direct UHNWI narratives to better anticipate and fulfill client needs.
- **Strategic Application:** Transform UHNWI insights into effective and engaging client management strategies.
- **Expert Leadership:** Benefit from the mentorship of Prof. Dr. Phil Klaus, a vanguard of UHNWI research and strategic client management.
- **Actionable Frameworks:** Construct and customize strategies for enhanced profitability through refined UHNWI engagement.
- **Performance Metrics:** Leverage sophisticated techniques for market share increase, revenue boost, and enhanced client conversion.
- **Cost Efficiency:** Innovate your approach to reduce UHNWI client acquisition and marketing expenses while maintaining excellence.
- **Precision Networking:** Connect and collaborate with global leaders in UHNWI client management.
- **Progressive Learning:** Stay at the forefront with state-of-the-art methods and tailor-made solutions for the evolving UHNWI sector.

# PROGRAM OUTLINE

Join us to sculpt the future of UHNWI client management, merging deep client understanding with strategic mastery for unmatched professional triumph.

2.5-Day Executive Education Program Outline: UHNWI Client Management

## DAY 1

### UNDERSTANDING THE UHNWI LANDSCAPE

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#### **Registration & Welcome Coffee**

A warm introduction to the program and participants

#### **The UHNWI Profile**

Exploring the defining characteristics and preferences of UHNWI clients

#### **The Art of Engagement**

Interactive session on creating impactful touchpoints with UHNWIs

#### **Strategic Frameworks**

Unveiling strategies for managing and enhancing UHNWI client relations

#### **Customization & Personalization**

Delving into personalization tactics for UHNWI servicing

#### **Networking Dinner**

An elegant gathering to foster connections and exchange insights on day one's learnings

## DAY 2

### ACTIONABLE INSIGHTS AND EFFECTIVE STRATEGIES

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#### **Insight-Driven Decision Making**

Harnessing UHNWI insights to inform managerial decisions

#### **Leveraging Technological Advances**

Embracing digital innovation in UHNWI client management

#### **Performance Metrics & KPIs**

Establishing and tracking key metrics for success with UHNWIs

#### **Case Studies & Best Practices**

Analysis of real-world examples of exceptional UHNWI client management

#### **Expert Dinner with Prof. Dr. Phil Klaus**

An intimate dining experience featuring an interactive dialogue with our expert, delving into his groundbreaking UHNWI research

## DAY 3

### INTEGRATION AND APPLICATION

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#### **Cost-Effective Client Acquisition**

Techniques to attract UHNWI clients while optimizing marketing spend

#### **Crafting the Ultimate Experience**

An interactive workshop aiming to craft bespoke UHNWI experiences

#### **Closing Remarks & Certificate Presentation**

A ceremonious conclusion and the presentation of certificates to acknowledge the professional development of our executives

#### **Farewell Luncheon**

A final networking opportunity to solidify new connections and reflect on the comprehensive journey of the past two and a half days

Program ends at 14.00

## PROF. DR. PHIL KLAUS

Prof. Dr. Phil Klaus is widely considered one of the leading global Customer Experience Strategists and the world-leading UHNWI researcher.

Prof. Klaus is ranked on the Stanford University Annual World's Top 2% Scientists list in 2019/2020/2021/2022 and 2023. He is the Chairman of the PK Customer Experience Institute, founder of Prof Dr. Phil Klaus & Associates Consulting, Professor of Customer Experience Strategy and Management at the International University of Monaco, and bestselling author of "Measuring Customer Experience".

His award-winning research is published in a wide range of top-tier academic and managerial journals and numerous books.

He is an experienced manager, Non-Executive Director, strategic advisor and management consultant with an active, international portfolio of Blue-Chip clients for whom he advises on customer experience strategy, profit enhancement, 'next practice,' and business development.



## WELCOME TO MONACO

Monaco, located between France and Italy, is a unique economic model, which is characterized by a zero-income tax policy for individuals, a diversified revenue base, a thriving finance sector, high-end tourism, and a strong focus on luxury markets, contributing to its reputation as a global economic and financial hub.

By taking advantage of its international setting, and the image of the Principality of Monaco, IUM provides a learning environment that combines the benefits of a small size country with the connections to global businesses, international diversity, and an entrepreneurial spirit.

The Principality of Monaco is a dynamic and multicultural environment where students can learn and experience the finance, sport, and luxury industries at the highest level. The country offers an unparalleled gateway to successful companies that work right on the IUM doorstep.







# THE IUM DIFFERENCE

The International University of Monaco is a private institution of higher education founded in 1986 in the Principality of Monaco, integrated within the OMNES Education, the French leader in private higher education.

IUM is AACSB accredited (Association to Advance Collegiate Schools of Business) and its MBA program holds the AMBA accreditation (Association of MBAs).

Its program portfolio includes Executive Programs, Bachelor, Master of Science, MBA and DBA degrees.

Renowned professors and experts are engaged in executive programs designed for global leaders and managers representing a diverse range of industries.

IUM is proud to remain an intimate, human scale business school with a profoundly multicultural outlook.

With more than 70 different nationalities in its student body, IUM encourages interactions and exchanges among students from around the world.

Whether you are an individual seeking to expand your skills and knowledge or an organization seeking to deliver innovative training solutions, the executive education team at IUM is ready to be your partner. We harness the expertise and practical insights of our esteemed faculty, Executive Education Fellows, and trusted Experts to provide you with engaging workshops and immersive learnings. This allows us to bring a wide range of corporate experience and outstanding academic credentials, all applied to your real business challenges.

## ADMISSIONS

We accept applicants for the programs on an ongoing basis as space permits, and we urge you to submit your application at your earliest convenience. While many programs don't have strict educational prerequisites, the admission process is competitive and centers on your professional accomplishments and your role within your organization.

## FOR MORE INFORMATION

Visit our [Website](#)

## CONTACT US

Myriam Arbel  
Business Development Manager,  
Executive Education  
[marbel@ium.monaco.edu](mailto:marbel@ium.monaco.edu)