

3-DAY WORKSHOP

# FINANCIAL SERVICE EXCELLENCE WITH ENNEAGRAM

[WWW.THEENNEAGRAMACADEMY.COM](http://WWW.THEENNEAGRAMACADEMY.COM)

OCTOBER 2022

19, 20 & 21 Oct 2022

25, 26 & 27 Oct 2022

NOVEMBER 2022

16, 17 & 18 Nov 2022

28, 29 & 30 Nov 2022



The  
Enneagram  
Academy

Supported by

**IBF** The Institute of  
Banking & Finance  
Singapore



# 01 OVERVIEW - LEVEL 1

## Understanding myself and others is the first step to effective relationship building

For Agency Leaders and Financial Consultants to increase self awareness, explore communication strengths, understand clients deeply, to build meaningful long term relationships.



### DURATION

3 x 3 Days Face-to-Face Training  
(Subject to Regulations)  
10AM - 6PM  
(21 CPD Hrs - Skills Category B, F, I)



### METHODOLOGY

Lectures  
Discussions  
Panel Interviews  
Role Play



### MATERIALS

Course Workbook  
Enneagram Typing Cards  
Sales Prospecting Cards Enneagram  
Personality Online Test

## 02 OBJECTIVES

- Understand the Enneagram framework and experience the roadmap to better relationship building, as financial experts and agency leaders
- Know your prospects and clients better by understanding how they prefer to be treated
- Uncover different ways to build relationship with clients of different Enneagram Types
- Explore various communication styles to appeal to clients
- Discover what motivates a client's purchasing decision
- See immediate results with quick tips and practical applications

## 03 HOW DOES IT BENEFIT YOU?

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Want to close more deals, recruit the right people and motivate them effectively?

It begins with knowing more about what makes different people tick, starting with ourselves.

Sometimes, we lack the self-awareness to manage our professional relationships successfully.

So it is crucial that we first understand ourselves before we can begin the journey towards understanding our co-workers and clients, and improving the team dynamics.

**"THIS BUSINESS IS ALL ABOUT  
RELATIONSHIP"**

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## 04 HOW DOES IT WORK?

Your Enneagram type reveals the distinct strategies you use when relating to yourself, others and the world around you. This tells you why your personality causes you to think, feel and act the way that you do.

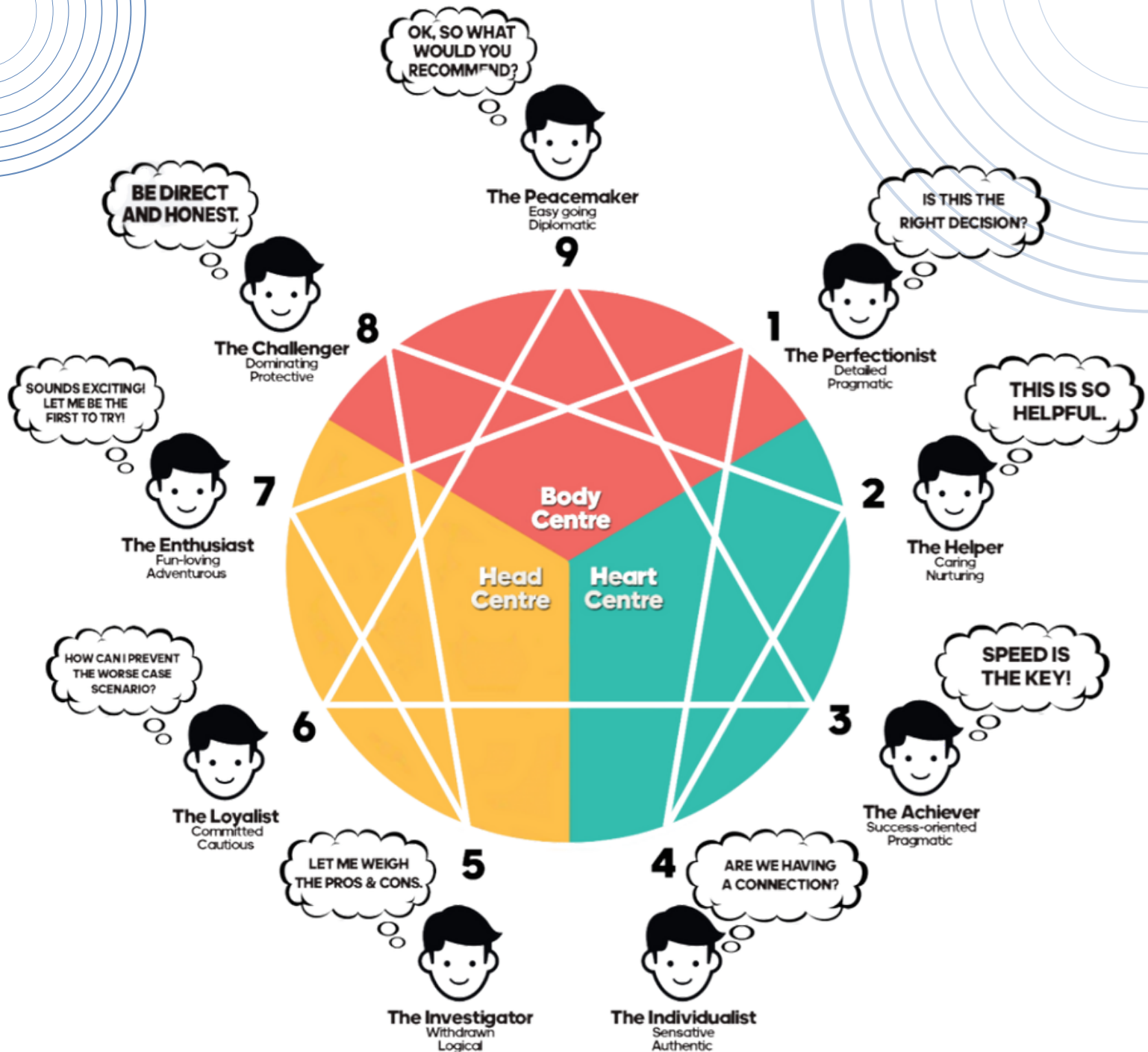
Each of the nine types has a unique style of interacting with other people.

Once you have insight into how your personality is different from your client's you will be able to gain a higher level of self-mastery.

With greater clarity and by leveraging on your strengths, you can change the way you make your pitch to suit the buyer so you win deals consistently.

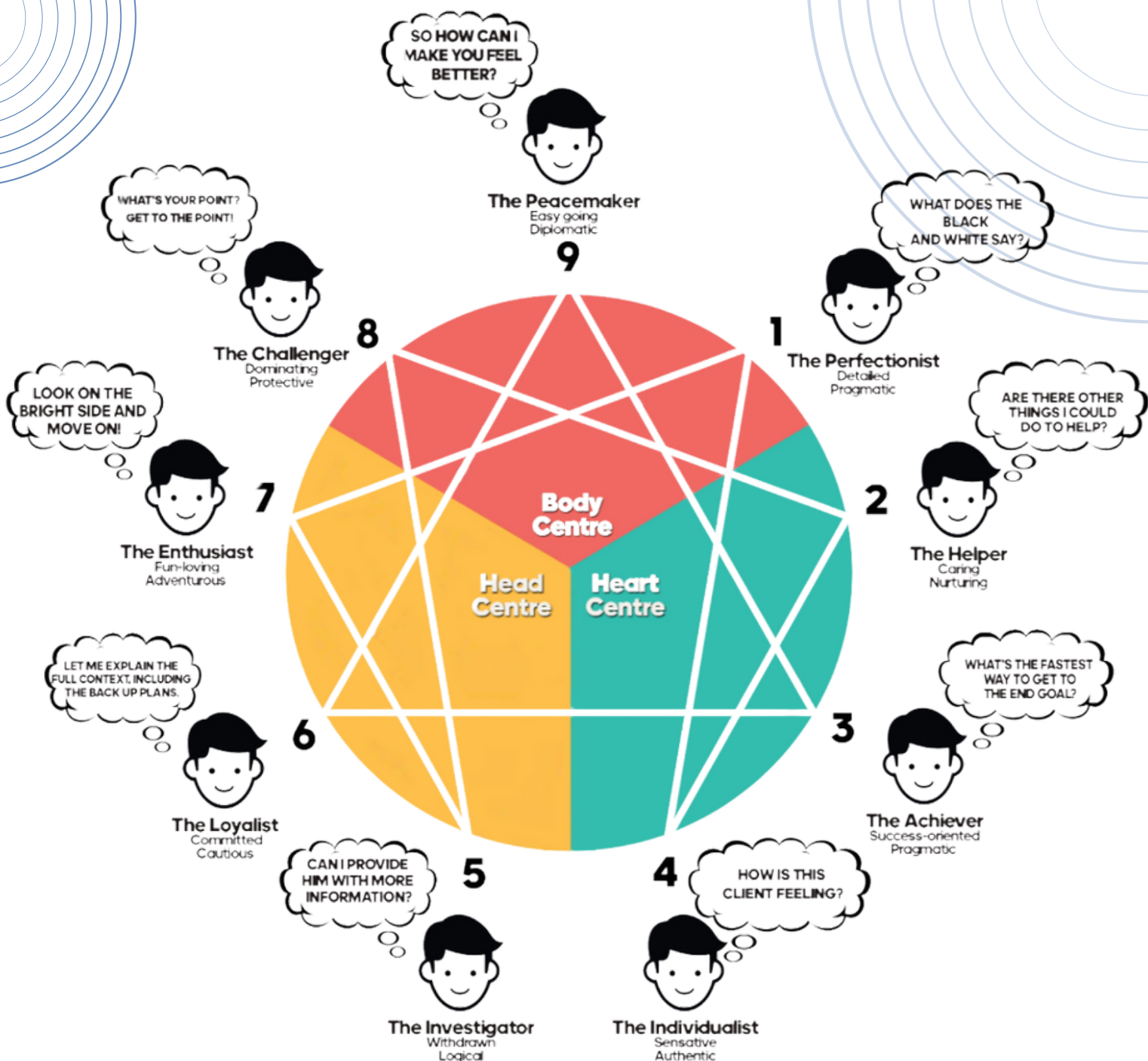
**"SELF-AWARENESS IS THE FIRST STEP TO  
SELF MASTERY"**

# 05 UNDERSTANDING HOW THE CLIENT THINKS...





# 06 UNDERSTANDING HOW THE FINANCIAL ADVISOR THINKS...



## 07 LEARNING OBJECTIVES (DIGS)



### DISCOVERY

Make sense of what the clients want and discover new communication styles and develop suitable engagement strategies that can appease and meet their needs.



### IMPROVEMENT

Improve your self mastery and increase your confidence level.



### GRATITUDE

Gain a deeper appreciation for the diversity in personalities and have fun learning to spot the different personality types around you.



### SKILLS

Apply the necessary strategies in sales, client servicing, relationship management and negotiation to gain better results in sales conversions.

## 08 THE PROCESS

01

Sign up for the course to get access to our Enneagram Personality Profility Test.

02

Complete the test online, before attending the workshop. A registration code will be sent to you.

03

Receive your test results on the day of the workshop.

04

Attend a one-to-one report analysis and coaching session with one of our qualified coaches over Zoom, after the workshop.

# OUR TRAINING TEAM



*Cindy Leong*

**IEA Accredited Enneagram Master Trainer**  
**Resident Relationship Expert of Mediacorp Class 95 FM**

Author | International Speaker | Entrepreneur, leading a team of 12 in Singapore and Malaysia  
Psychology and Business Trained | Initiator of the Enneagram Prison Project (Singapore)  
Effectively Bilingual  
Trained directly by Claudio Naranjo, Ginger Lapid Bogda, Peter O'haranhan

Cindy is a highly sought-after Enneagram Personality Coach and Corporate Trainer who can help you make sense of your professional and personal relationships. She has founded The Enneagram Academy – the first and only International Enneagram Association (IEA) Accredited Training School in Southeast Asia. She has also founded Relationship Studio and Divine Connect. She is currently leading a team of 12 in Singapore and Malaysia.

She is an Accredited Professional with the IEA. She is also an Associate Certified Coach (ACC) of the International Coach Federation (ICF) and a member of Singapore Psychological Society (SPS). She has worked with the Financial Industry for the last 8 years and is personal mentor and coach to many COT and TOT Achievers in Singapore and Hong Kong.

Cindy is effectively bilingual. To date, she has impacted more than 20,000 lives. She is also frequently featured in magazines and radio stations in Singapore and is currently the Resident Love Expert on MediaCorp Class 95 FM.



*Coen Tan*

**IEA Accredited Enneagram Master Trainer**  
**Authentic Communications Speaker**

Chief Listening Officer | International Speaker | Certified MBTI and NLP Trainer  
Background in Business Human Resource Consulting | Effectively Bilingual  
Trained directly by Claudio Naranjo, Jerome Wagner, Ginger Lapid Bogda, Peter O'haranhan

Having emerged from a decade of depression, Coen brings his unique experiences, fresh perspectives and finely-honed skills to people he works with. Coen has trained regionally and spoken in Singapore, China, India, Thailand, Malaysia, Philippines and Taiwan, in both English and Mandarin.

A Distinguished Toastmaster, Coen has achieved the Gold Distinction Award (Speaking in Public) by the London Academy of Music and Dramatic Arts (LAMDA). He is also a member of various professional associations, such as the Global Speakers Federation (GSF), Asia Professional Speakers Singapore (APSS), the Association of Talent Development (ATD) and the Adult Educators' Network (AEN).

Coen's dynamic energy, authentic style, personable approach and sometimes unorthodox style are infectious and instrumental in helping his clients achieve personal breakthroughs and unleash their underlying potential.



# OUR TRAINING TEAM



Vivien Yap

## Certified Enneagram Trainer and Coach

11 years in Training Industry | Motivational Speaker | Life Coach & Style Coach | Youth Mentor  
Background in Counselling & Psychology | Fashion & Parenting Mummy Blogger  
Founder of Runwaymummy.com | Enneagram Prison Project

Vivien is a government certified ACTA Trainer who is passionate about empowering individuals to discover how to utilize their strengths to excel in the sales & financial services industry.

With more than a decade experience as a trainer in this industry, her deep conviction that every type embeds the gifts of being a successful leader is often inspiring and propels you to breakthrough. Her corporate workshops has equipped many financial organizations reach their maximum potential and improve work place cohesiveness through practical people management tools.

As a certified NLP Practitioner & Enneagram Life Coach and her background in Counselling & Psychology helps her be an empathic & effective coach who cares deeply in your journey to becoming an industry expert. She has helped many clients to make lasting positive transformation in their life through her personable 1-on-1 coaching the last 16 years.

## 09 OUR CLIENTS



## 10 TESTIMONIALS



*Christopher Ong*  
Agency Director



As the Director of a premier agency, I am acutely aware about the importance of good team dynamics in the workplace. I needed a trainer and a programme that could help my team understand each other better and also improve productivity at work.

Relationship Studio, The Enneagram Academy, has just the right person for the task. In fact, Cindy's team exceeded our expectations. They didn't just teach us about the Enneagram. Instead, the coaches very quickly understood our organisation's needs and deftly crafted the session in an angle that would be most meaningful and useful for me and my team.

Since the training, I've seen visible and measurable improvements in my team's performance. Overall sales have gone up by 20% and the team reports that they understand their clients (and even their spouses) so much better now. This is a great course for those who are keen on EQ-development, sales, team motivation and recruitment.



*Ivan Chee*  
Senior Director  
Great Eastern



Relationship Studio's Enneagram training is unlike many personality profiling program out there in the market. It is very insightful and provides very in depth and comprehensive perspective of individual personality. In the training, it helps that the participants get to share openly, gain better understanding of others' personality and learn how to work better together.

It also provides a growth roadmap to help us attain our "nirvana" (A higher self-mastery state, encompassing the positive traits of all 9 Types). I personally have benefited tremendously from the program in my leadership role. I now better understand why some individuals think and respond in a certain way (different from myself).

This has helped me develop greater empathy, and at the same time, allow myself to adopt the best way to communicate effectively.

# IMPORTANT INFORMATION

## TRAINING METHODOLOGY

A combination of lecture, group discussions, peer coaching, role play & panel interview

## DURATION

3 Days (21 CPD Hours and IEA Track) | Time: 10AM - 6PM

**ABSORBING  
100% GST FOR  
ENROLMENT  
TILL  
31 DEC 2022**

## INVESTMENT

SGD 1,995

## NETT FEE AFTER IBF SUBSIDY

90% funding - 40 & above SGP

SGD 199.50

50% funding - below 40 yrs old SGP

SGD 997.50

50% funding - ALL PRs

SGD 997.50

## WORKSHOP BONUS

- Enneagram Online Test
- Enneagram Typing Cards
- Sales Prospecting Cards
- 1 hour 1-to-1 report analysis and coaching session
- Digital Badge

## GRANT ELIGIBILITY

1. Singapore-based financial Institutions regulated by MAS (licensed or exempted from licensing by MAS)
2. FinTech firms certified by Singapore FinTech Association
3. Singapore Citizens or Singapore Permanent Residents, physically based in Singapore
4. Successful completion of the course

## TO REGISTER, EMAIL OR CALL US TO FIND OUT MORE

Email: [vel@theenneagramacademy.com](mailto:vel@theenneagramacademy.com)  
Whatsapp: +65 9800 9283  
Website: [www.theenneagramacademy.com](http://www.theenneagramacademy.com)  
Address: 380 Jalan Besar ARC380 08-01, 209000

