

Certified Relationship Manager Practice Test Questions and Answers

1. What is the primary goal of relationship management in financial services?

- A) Maximizing short-term profits
- B) Building long-term client loyalty and satisfaction
- C) Reducing operational costs
- D) Increasing product sales volume

2. Which metric is most important for measuring client relationship success?

- A) Number of transactions
- B) Client retention rate
- C) Average account balance
- D) Frequency of contact

3. When handling a client complaint, what should be the relationship manager's first step?

- A) Offer immediate compensation
- B) Listen actively and acknowledge the concern
- C) Transfer to a supervisor
- D) Explain company policies

4. What is the most effective approach for cross-selling financial products?

- A) Aggressive sales tactics
- B) Understanding client needs and offering relevant solutions
- C) Promoting the highest commission products
- D) Following predetermined sales scripts

Answers: 1-B 2-B 3-B 4-B

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