

THE
Clienteling
ACADEMY

**YOUR JOURNEY TO
CLIENTELING
EXCELLENCE**

What We Offer - The Clienteling Mastery Journey

INPIRE AND EDUCATE

Founder's Keynote

The Art & Science of Clienteling™
Fundamentals

CONNECT - Client Discovery and
Conversion

COMMUNICATE - Client
Re-Engage and Retention

CULTIVATE - Client Loyalty and Lifetime
Value

The Art & Science of Clienteling™
Leadership Coaching

EVALUATE

The Art & Science of Clienteling™
Capability Confidence Score

The Art & Science of Clienteling™
Behaviour Excellence Audit

The Art & Science of Clienteling™
Learning Ecosystem Audit

EMBODY

Personal Brand Mastery - High-Impact
Personal Branding for Client-Facing
Teams

Influential Mastery - High-Value Selling
with HNWIs

Clienteling Learning Labs

The Art & Science of Clienteling™ Keynote



Trusted by some of the world's most prestigious luxury businesses, The Art & Science of Clienteling™ Keynote is The Clienteling Academy's flagship speaking experience delivered by our Founder Gogo Cheng - designed to inspire awareness, shift mindset, and spark appetite for deeper understanding of the philosophy, psychology, and commercial power behind luxury clienteling.

Keynote Highlights

Why clienteling is the new luxury differentiator

What clienteling success looks like in the modern luxury world

The 3Cs of Clienteling Excellence – Connect, Communicate, Cultivate

How human interactions translate into commercial advantage

Real case studies demonstrating client loyalty in action

📄 **This Keynote Is Designed For:** All Luxury Professionals

Format and Duration: 90 minutes - In-Person or Virtual

Participants Will Receive: Inspirational digital booklet

The Art & Science of Clienteling™ Fundamentals

This signature workshop establishes the foundations of clienteling excellence by equipping luxury professionals with the skills, methodologies and behaviours required to connect, communicate and cultivate client relationships from the very first interaction.

Participants are introduced to the key principles of a service excellence mindset, instant rapport building, decoding communication effectiveness, understanding the art and science of storytelling and mastering relationship intimacy circle.

Skills You'll Master

 Customer Loyalty

 Personal Branding

 Effective Communication

 Relationship Building

This Workshop Is Designed For:

All Client Facing Professionals: Retail Associates, Stylists, Advisors, Service Teams, Relationship Managers, Hospitality Service Teams, Client Development Specialists

Learning Level:

Entry to Intermediate

Format: In-Person or Virtual

Participants Per Workshop: 15 max

Course Modules

1

Why Client Loyalty Matters

Explore the shift from transactional selling to cultivating lifetime value, equipping participants to build enduring client relationships that drive sustainable revenue.

Through the psychology of luxury loyalty and practical role-modelling of emotional resonance, learners will master how to create meaningful moments, deepen brand affinity, and inspire repeat advocacy in high-end markets.

2

Developing a Holistic Luxury Presence

Unpack the Five Facets of Personal Branding - Etiquette, Mindset, Expertise, Appearance, and Communication - to help participants craft a cohesive, credible, and compelling professional identity. Through practical frameworks and applied exercises, learners will refine how they show up, think, perform, present, and speak so their brand consistently signals trust and value.

3

CONNECT – Building Authentic Relationships

Demystify how first impressions are formed, revealing the rapid cognitive shortcuts that shape judgments in seconds. Using the SPCV Model™ and the Language of Perception, participants learn to decode and intentionally craft signals to create immediate, lasting credibility.

4

COMMUNICATE – The Science of Effective Communication

Use the expanded GC Communication Wardrobe, to help participants build self-awareness and communicate with intention - selecting the right tone, structure, and delivery to match audience, purpose, and stakes for clearer, more persuasive impact.

5

CULTIVATE – Building Trust & Long-Term Relationships

Equip participants to initiate and sustain meaningful client connections by practicing credibility-building behaviours from the very first touchpoint. Using the Relationship Intimacy Circle, learners will map stages of closeness, apply trust accelerators, and design early interactions that plant the seeds of long-term trust and loyalty.

Participants Will Receive:

The Art & Science of Clienteling™ Fundamentals completion certificate

Inspirational digital booklet

Workshop Methodologies:

- Five Facets of Personal Branding
- SPCV Model
- The Language of Perception
- GC Communication Wardrobe
- The Relationship Intimacy Circle

The Art & Science of Clienteling™ – CONNECT

CLIENT DISCOVERY AND CONVERSION

This is the first stage of The Clienteling Academy's 3C Journey - Connect, Communicate and Connect - a holistic approach to master exceptional clienteling. The modules are designed to help learners create meaningful first impressions, reading client cues, conducting client needs discovery, and building authentic human connections that set the tone for loyalty. This is where relationships begin, trust is seeded, and long-game loyalty becomes possible.

Participants learn to navigate client needs—both stated and unstated—through the mastery of luxury etiquette, connection psychology, storytelling, and hospitality-driven service rituals.

Skills You'll Master

 Luxury Etiquette

 Storytelling

 Store Ceremony

 Luxury Hospitality

Course Modules

1

Mastering Luxury Etiquette & First Impressions

1.1 Role of a Luxury Host

Train participants in the role of a luxury host - blending gracious protocol with high-touch service to signal exclusivity and care from the first moment.

1.2 Using the Three-Step First Impression Formula and the Store Visit Ceremony

Learners will choreograph a structured, end-to-end experience that welcomes and guides clients with seamless elegance.

2

Exploring Client Needs with Depth & Sensitivity

2.1 Dance of Connection

Develop the art of small talk, rapport, and authentic human warmth to build emotional resonance and relevance in every interaction.

2.2 The GC Storytelling Framework

Participants learn to spark meaningful dialogue, and create memorable, trust-rich conversations through training in reading emotional, behavioural, and contextual cues.

3

Meeting & Exceeding Client Expectations

3.1 Luxury Decision Pathways

Unpack how product desire forms along luxury decision pathways, giving participants tools to guide clients from curiosity to confident choice.

3.2 Luxury Hospitality

By combining hospitality with service, learners will transform interactions into personalised moments and elevate expectations through creativity, anticipation, and bespoke touches.

Participants Will Receive:

The Art & Science of Clienteling™ CONNECT module completion certificate

Inspirational digital booklet

Personal "Connection Habits Blueprint"

This Workshop Is Designed For:

All Client Facing Professionals: Retail Associates, Stylists, Advisors, Service Teams, Relationship Managers, Hospitality Service Teams, Client Development Specialists

Learning Level:

Intermediate to Advanced

Format: In-Person or Virtual

Participants Per Workshop: 15 max

Workshop Methodologies:

- The Role of a Luxury Host
- The Three-Step First Impression Formula
- Store Visit Ceremony
- The Dance of Connection
- The GC Storytelling Framework


The Art & Science of Clienteling™ – COMMUNICATE

CLIENT RE-ENGAGEMENT AND RETENTION


This workshop is the second stage of the 3Cs journey: turning connection into engagement. The modules are designed to help the participants the science and psychology behind powerful communication – enabling them to influence authentically, speak with gravitas, adapt to client preferences, and build emotional resonance that drives loyalty and commercial impact.

Participants learn to adapt their communication style, decode client motivations, influence ethically, and build emotional resonance across in-person, digital, and hybrid touchpoints. This is where 'the Art' - presence, empathy, storytelling meets 'the Science' - psychology, behavioural cues, communication structure in the world of luxury communication.

Skills You'll Master

 Emotional Intelligence

 Influence & Persuasion

 Decode Motivation

 Communication Habits

Course Modules

1

Mastering the GC Communication Wardrobe

1.1 Dress Your Communication with Intention

Help learners deepens self-awareness of their default personal communication style so they can recognise, flex, and align their approach across contexts.

1.2 Meet Your Clients in the Right Channel

Learners will practice how to optimise tone, energy, pace, and body language—while speaking with gravitas and emotional clarity and meeting each client's preferred channel for maximum rapport and impact.

2

Decoding Customer Motivations & Psychology

2.1 Personal Motivation Drivers

Uncover personal motivational drivers that build authentic, influence-ready self-awareness. Introduce how luxury client psychology provides insight into client decision-making.

2.2 The Art and Science of Influence in Action

Learners will apply psychologically aligned language to core motivations and practices The Art & Science of Influence to create ethical, personalised interactions that feel natural and effortless.

3

Communicating for Impact & Emotional Resonance

3.1 Communication for Impact

Shape memorable communication through storytelling, using emotion appropriately in conversations, and “landing” messages with clarity and confidence.

3.2 Handling Objections with Confidence

Learners will practice how to converts customer objections into opportunities through empathy while building psychological safety and trust so that dialogue remains open, respectful, and persuasive.

Participants Will Receive:

The Art & Science of Clienteling™ COMMUNICATE module completion certificate

Inspirational digital booklet

Personal Communication Style Snapshot

This Workshop Is Designed For:

All Client Facing Professionals: Retail Associates, Stylists, Advisors, Service Teams, Relationship Managers, Hospitality Service Teams, Client Development Specialists

Learning Level:

Intermediate to Advanced

Format: In-Person or Virtual

Participants Per Workshop: 15 max

Workshop Methodologies:

- GC Communication Wardrobe
- GC Communication Styles in Action
- Dress Your Communication with Intention
- Personal Motivation Drivers
- Art & Science of Influence

The Art & Science of Clienteling™ – CULTIVATE

CLIENT LOYALTY AND LIFETIME VALUE

This is the final, and the most advanced stage of the 3Cs journey: turning communication into loyalty, advocacy, and revenue. All modules are designed to help luxury professionals evolve from transactional selling to intentional stewarding of relationships, building lasting emotional loyalty.

Participants learn to analyse client portfolios, identify growth opportunities, design multi-touchpoint engagement plans, and execute outreach with The Clienteling Academy's signature warmth, precision, and commercial intent.

Skills You'll Master

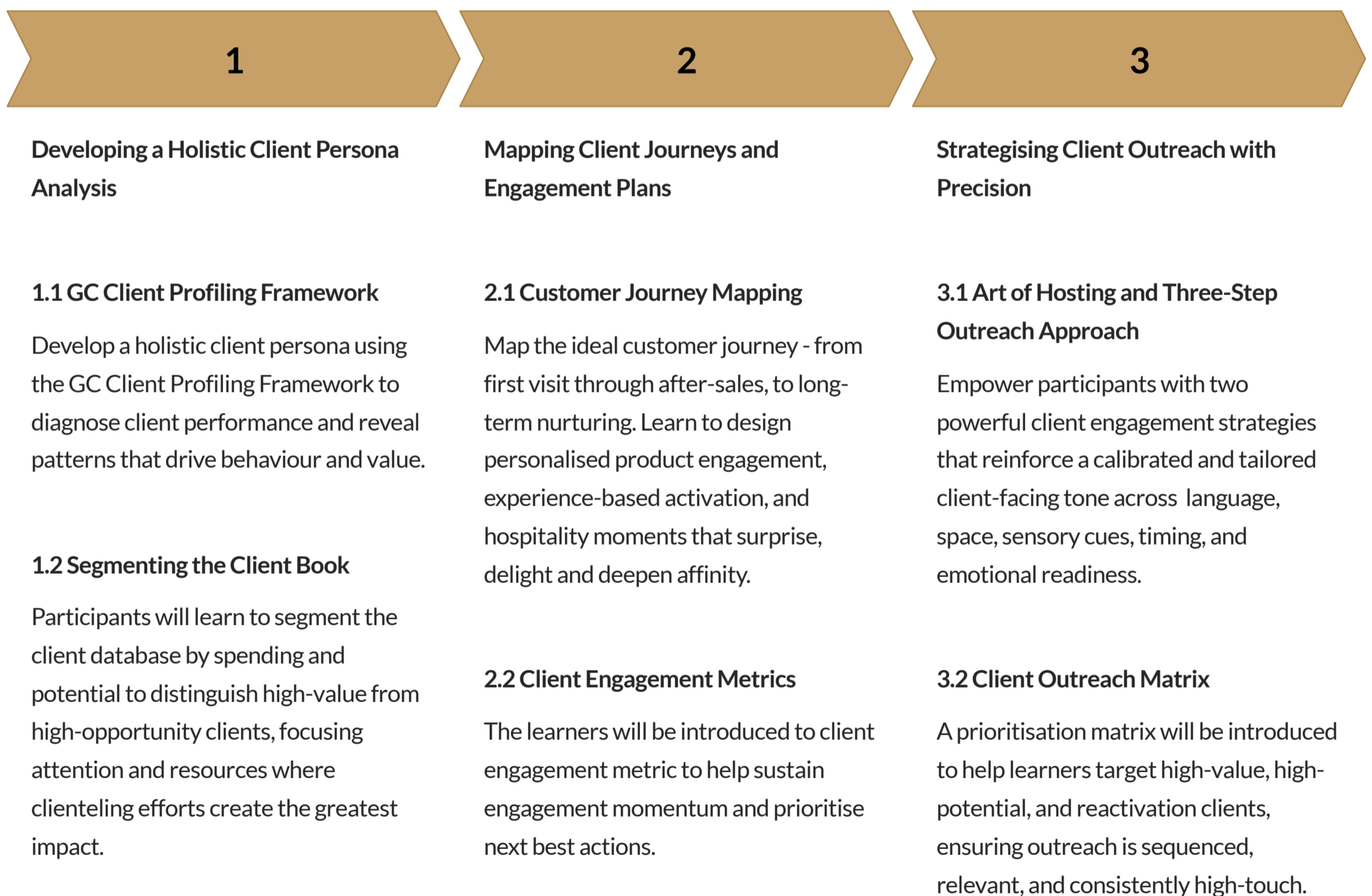
 Journey Mapping

 Personalised Outreach

 Client Profiling

 High Value Opportunity

Course Modules



Participants Will Receive:

The Art & Science of Clienteling™ CULTIVATE module completion certificate

Inspirational digital booklet

Individual Client Development Strategy Blueprint

This Workshop Is Designed For:

Client Development Managers/Sales Managers
Senior Client-Facing professionals: Stylists, luxury advisors, relationship managers
Personal shoppers, CRM specialists
Client concierge / lifestyle / hospitality teams

Learning Level:

Advanced

Format: In-Person or Virtual

Participants Per Workshop: 15 max

Workshop Methodologies:

- GC Client Profiling Framework
- Multi-Touchpoint Engagement Journey
- Three-Step Outreach Approach
- Environmental Preferences in Hosting
- The Art of Hosting

The Art & Science of Clienteling™ Leadership Coaching

This is the flagship coaching workshop crafted by our Founder Gogo Cheng to transform leaders from managers into clienteling coaches - bridging individual competence and organisational capability.

Powered by leadership training and coaching simulation, the workshop combines coaching psychology, practical clienteling tools, real-case scenarios, and commercial alignment techniques to help leaders diagnose team gaps, create personalised coaching plans, role-model excellence, give feedback that motivates change, transform daily rituals, and build a culture of recognition and emotional loyalty.

Skills You'll Master

 Performance Management

 Team Coaching

 Team Motivation and Recognition

 Action Planning

This Workshop Is Designed For:

Boutique Managers
Client Development Leaders
Retail Managers
CRM Team Leaders
Hospitality/Service Leaders

Learning Level: Advanced

Format: In-Person or Virtual

Participants Per Workshop: 15 max

Course Modules

1

Identify Boutique Clienteling Challenges and Opportunities

Unpack the 4-step GC Coaching Foundation - from identifying team strengths and gaps, diagnosing team clienteling behaviour with GC tools, to advance leadership impact through storytelling and role modeling to build emotional buy-in, creating coaching momentum for consistent, high-performance habits.

Essential workshop focus

foundational diagnosis

Mastery workshop focus

deeper case analysis and team profiling

2

Create Impactful Store-Level Clienteling Rituals

Shift from instruction to experience-based coaching with daily clienteling rituals to create rapid, impactful, on-the-floor learning. Embed coaching micro-habits and foster psychological safety so behaviour change sticks, elevating team performance through consistent, low-friction and result-driven practice.

Essential workshop focus

establish key rituals

Mastery workshop focus

ritual design with habit embedding and measurement

3

Translate Clienteling into Commercial Language

Connect day-to-day behaviours to measurable sales impact by simplifying clienteling KPIs and coaching with data from CRM, client books, and engagement scores. Integrates clienteling into performance reviews to create individualised growth opportunities and builds a culture of recognition.

Essential workshop focus

fundamental alignment

Mastery workshop focus

advanced KPI design, tracking & storytelling

4

Real-Case Simulations and “Coach the Coach” Labs

Use scenario-based coaching with real participant cases and structured debriefs to surface root causes and sharpen practical problem-solving. Converts insights into action plans with clear ownership and accountability, ensuring learning transfers to front line teams, and transform clienteling excellence.

Essential workshop focus

fundamental alignment

Mastery workshop focus

advanced KPI design, tracking and storytelling

Participants Will Receive:

The Art & Science of Clienteling™ Leadership Coaching completion certificate

Inspirational digital booklet

GC Leadership Coaching Playbook

Personalised coaching plan with 30-day implementation roadmap

Workshop Methodologies:

- GC Coaching Foundations
- The One-Minute Coaching Moment
- End-of-Day Reflection Huddle
- GC Communication Wardrobe
- Personal Motivation Drivers

Personal Brand Mastery

High-Impact Personal Branding for Client-Facing Teams

In the world of top 1% players, personal branding is not only about visibility, it is also one of the most powerful differentiators.

Personal branding is the intentional and disciplined alignment of mindset, etiquette, expertise, appearance and communication that enables the client-facing team to build trust and credibility over time.

This Personal Brand Mastery workshop equips client-facing professionals to develop a holistic luxury presence, cultivate effective communication habits, and define a distinctive yet adaptable charisma - so that every interaction with HNWI clients feels intentional, credible, and persuasive.

Using GC's proprietary frameworks and applied communication psychology, participants refine their personal impact and behavioural style when building relationships with HNWIs - transforming their presence into a strategic asset.

Skills You'll Master

 Luxury Presence

 Communication Style Awareness and Body Language

 Charisma Range Development

 Gravitas in High-Stakes Conversations

 Long-term Relationship Building and Credibility Signaling

 **This Workshop Is Designed For:**

All Client Facing Professionals: Retail Associates, Stylists, Advisors, Service Teams, Relationship Managers, Hospitality Service Teams, Client Development Specialists

Learning Level:

Intermediate to Advanced

 **Format:** In-Person or Virtual

Participants Per Workshop:
15 max

Duration:

2 day / 8 hours per day

Course Modules

1

Developing a Holistic Luxury Presence

This module explores the foundational elements of luxury presence. It's about cultivating an authentic, influential persona through consistent and intentional effort, setting you apart as a powerful differentiator.

Learners will unpack the Five Facets of Personal Branding - Etiquette, Mindset, Expertise, Appearance, and Communication to help participants craft a cohesive, credible, and compelling professional identity.

2

Mastering the GC Communication Wardrobe

Mastering communication is like mastering personal style, it's about knowing when to choose each approach to make the right impression. Each style has unique character strengths and signature expressions.

Learners will explore the six communication wardrobe, identify their primary communication styles and decode how to identify and meet each client's preferred channel for maximum rapport building impact.

3

Defining Your Signature Charisma

Charisma is a learnable skill, not an innate trait. It encompasses a spectrum of styles that can be intentionally developed and deployed to enhance your influence and engagement.

Learners will identify their natural charisma style tied to their PCM profile, and practise expanding charisma range across different client type and scenarios for HNWI clients.

4

Communicating with Gravitas and Impact

How you deliver a message matters as much as what you say. The same words land differently depending on tone of voice, body language, and emotional regulation.

Learners will practise the four purposes of communication interpreted through PCM, master charismatic body language, and recognise communication pitfalls.

5

Building Trust and Credibility Over Time

In the complex world of high-net-worth relationships, trust is not merely a preference - it's a prerequisite.

Learners will master trust building frameworks, credibility signaling and relationship progression journey to cultivate deep, lasting credibility with their clients.

Participants Will Receive:

Process Communication Model Profile (Optional)

Personal Brand Development Worksheet

Charisma Range Development Guide

Gravitas Toolkit for High-Stakes Moments

Inspirational Digital Workbook

Workshop Methodologies:

- GC Communication Wardrobe
- The Five Elements of Luxury Presence
- Relationship Intimacy Circle
- The Four Charisma Styles Matrix
- SPCV Framework
- The Science of Trust Framework
- Process Communication Model (optional profiling)

Influential Mastery

High-Value Selling with HNWIs

In the world of top 1% clients, selling is not about persuasion - it is about influence.


True influence begins with understanding how HNWIs make decisions, what drives their motivations, and how emotional and psychological factors shape commitment. It requires the ability to decode communication preferences, interpret unspoken signals, and guide conversations with clarity and confidence.


This Influential Mastery workshop equips client-facing professionals to move beyond traditional selling techniques and adopt a psychology-informed approach to high-value engagement. Participants learn to align product value with client identity, to apply structured storytelling to influence meaningfully, to read emotional cues with precision, and to navigate objections as opportunities for reassurance.

Using GC's proprietary frameworks, PCM behavioural insights, and applied decision-making psychology, participants refine how they influence, respond, and close - strengthening both commercial confidence and long-term trust.

Skills You'll Master

 Communication Channel Matching

 Powerful Storytelling

 Reading Emotional Signals

 Objection Handling

 Closing with Confidence

Course Modules

1

Influence vs. Persuasion

True influence is not about pushing, but about achieving alignment. This module explores how understanding the real drivers behind decisions enables you to guide interactions without resorting to traditional persuasion tactics.

Learners will develop knowledge of the science of decision making, inspired by Dr. Cialdini. They will map a client's decision drivers and practise reframing product features as alignment with client values.

2

Decoding Communication Preferences

This module focuses on decoding communication preferences and underlying motivations. Participants will learn how to create powerful first impressions, build authentic rapport, and influence without traditional persuasion tactics.

Learners will participate in interactive activities where they practise spotting communication preferences in real-time and matching channels appropriately.

3

Storytelling That Influences

The science of storytelling lies in influencing through compelling and structured narratives. The 6-stage storytelling framework helps participants understand story architecture and the emotional pacing required to resonate with different client motivations.

Learners will develop a story using the 6-stage structure and practise adjusting emotional pacing according to different PCM types.

4

Reading Emotional Signals

Reading emotional intelligence in professional interactions is a critical skill to interpret unspoken cues and manage challenging conversations with empathy and precision.

Learners will observe non-verbal cues and micro-expressions in conversations; identify both positive and stress signals, and practise adjusting communication style based on emotional signals.

5

Handling Objections and Closing High Value

An objection is a request for reassurance, not rejection. Navigating objections with empathy and precision is essential to close high-value transactions and build lasting trust.

Learners will role-play common objection styles linked to client distress patterns, and practise distress recovery techniques to turn resistance into opportunities for commercial success.

Participants Will Receive:

- Optional Process Communication Model Profile
- Communication Channel Matching Guide
- Storytelling Framework
- PCM Motivation and Stress Signals Guide
- Inspirational digital workbook

This Workshop Is Designed For:

All Client Facing Professionals: Retail Associates, Stylists, Advisors, Service Teams, Relationship Managers, Hospitality Service Teams, Client Development Specialists

Learning Level:

Intermediate to Advanced

Format: In-Person or Virtual*

Participants Per Workshop: 15 max

Duration:

2 day / 8 hours per day

Workshop Methodologies:

- Communication Preference Framework
- 6-Stage Story Structure
- Psychological Needs Decoder
- Objection Styles by Client Motivation
- Relationship Intimacy Circle in Action
- Distress Recovery Technique
- GC Influence Map Framework

Clienteling Learning Lab

Clienteling Learning Labs are 90 minute experiential workshops focused entirely on practice, coaching, simulation, and skill application - bridging the gap between training and real-world behaviour, and powered by all key knowledge and skills covered in our The Art & Science of Clienteling™ workshops.

Each Lab centres on a single behavioral focus and can be booked as a multi-session series to elevate team capability, accelerate habit formation, and drive immediate on-the-floor impact.

☐ This Learning Lab Is Designed For:

Teams who need hands-on practice

Format: In-Person or Virtual

Max Participants Per Workshop: 15

Duration: 90 minutes

Behavioural Focus Covered



Learning Formats:

- Guided practice
- Triad simulations
- Real client scenario role-play
- Immediate facilitator feedback
- Peer coaching
- Micro-reflections
- Behaviour tracking

Participants Will Receive:

- Demonstrated behavioural capability
- Personal feedback from The Clienteling Academy coaches
- One-week micro-habit commitments
- Learning lab performance snapshot
- Strengths & growth point report

Leaders Will Receive:

- Team participation insights
- Recommended coaching prompts
- Behaviour progression trends*
- *if combined with Evaluation Suite

The Art & Science of Clienteling™ Evaluation Suite

The Clienteling Academy Evaluation Suite extends our partnership beyond education by assessing capability, implementing knowledge, and reinforcing learning at every level. It includes a self-evaluation Clienteling Capability Confidence Score to benchmark individual readiness, a Clienteling Behaviour Excellence Audit for leaders to observe, rate and coach real on-floor behaviours, and ultimately a Clienteling Learning Ecosystem Audit for enterprise-level evaluation of processes, tools, and culture. Together, these tools create a clear baseline, reveal gaps, and guide targeted interventions that turn training into sustained performance and customer profitability.



Clienteling Capability Confidence Score

This is the flagship self-evaluation tool designed to help client-facing teams assess their clienteling confidence across the 3Cs - Connect, Communicate, and Cultivate. It also measures key GC behaviours before and after training, ensuring learning is measurable, and participants can track their progress.

Benefits

Measures perceived confidence, not competency

Creates personalised learning insights

Generates before and after comparison

Feeds into coaching conversations

Offers psychological ownership of growth

Key Audit Areas:

Presence (SPCV Model)

GC Communication Wardrobe

Storytelling confidence

Relationship-building behaviours

Emotional intelligence

Client follow-through habits

Values and mindset

This Tool Is Designed For:

All Client Facing Professionals

Assessment Format:

Digital link

Assesseees Will Receive:

Individual confidence report

Leaders Will Receive:

Group insights summary

Report Contains:

Scores per behavioural category

Personal strengths

Growth opportunities

Suggested daily practices



Clienteling Behaviour Excellence Audit

This signature manager-evaluation tool is to help leaders observe and evaluate actual clienteling behaviours demonstrated by their teams on the floor - turning learning into ongoing, trackable behavioural practices.

Benefits

Reinforces post-training habits

Gives leaders tangible criteria to coach their teams

Links learning to commercial reality

Builds internal clienteling culture

Demonstrates ROI through visible behaviour adoption

Key Audit Areas:

Daily Behaviours

Client Engagement Behaviours

Client Development Behaviours

This Audit Is Designed For:

Client Development and Sales Leaders

Assessment Format:

Digital Checklist

Leadership Guide

Leaders Will Receive:

Individual Behaviour Excellence Scorecard

Team Heatmap Dashboard

Standard Coaching Guide

Report Contains :

Observation guidelines

Coaching prompts

Reflection questions for leaders

Example behaviours aligned with GC frameworks

*Subscription includes 1-hour call with leadership team on usage



Clienteling Learning Ecosystem Audit

This is the consulting-level evaluation of a brand's clienteling culture, systems & learning architecture - designed to assess the organisation's readiness, maturity, and systemic support for clienteling behaviour change.

Benefits

Identifies gaps in clienteling culture, tools, KPIs, leadership rituals, and learning infrastructure

Guides multi-year clienteling strategy

Defines ROI roadmap

Key Audit Areas:

Clienteling Culture & Leadership Alignment

Clienteling Team Capability & Confidence

Learning Ecosystem Maturity

KPIs & Commercial Connection

Brand Differentiation & Experience Design

This Audit Is Designed For:

Enterprise

Assessment Format:

Training deck review

Leader interviews

Survey analysis

Workshop debrief

Duration:

OPTION A Mini ecosystem Audit 4 weeks

OPTION B Full ecosystem Audit 6-8 weeks



The Clienteling Academy Learning Audit Report

Report includes:

Brand Clienteling Maturity Score

Capability Heatmaps

Culture Insights

Learning Gaps

Leadership Gaps

Commercial Opportunity Map

12-Month Strategy Roadmap

The Clienteling Academy Learning Audit Presentation

"Make memorable human interactions your most powerful luxury differentiator."



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