Symphony Digest

INFLUENCING & NEGOTIATION MASTERCLASS

Learn how to influence and negotiate with your stakeholders to market, inform or get the outcome you want. Let's learn the art of the deal.

3 June 2027

9 am - 5 pm

AICB Centre of Excellence, KL

RM1,980 per participant

REGISTERED HRD CORP TRAINING PROVIDER



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COURSE OUTLINE

Module 1: Influencing in the Capital Market Context

- Establishing Credibility and Trust with Clients and Stakeholders
- Understanding Personal Power and Its Role in Influencing Outcomes
- Balancing Commercial Objectives with Regulatory Expectations
  - Applying the Credibility Matrix in a Professional Context
  - Mini Case Vignette: The High-Yield Bond Recommendation

Module 2: Building Influential Relationships Across Stakeholders

- Adapting Behaviour to Influence Clients, Investors, and Internal Stakeholders
- Finding Common Ground in Client and Stakeholder Conversations
- Applying Assertive Behaviour in High-Stakes Discussions and Negotiations
  - Adapting Your Approach in Challenging Stakeholder Situations
  - Aligning Investor Expectations with Risk–Return Profiles
  - Assertiveness in Practice: Client and Stakeholder Scenarios
  - Assertive Behaviour Role-Play: Handling Difficult Conversations in Client Advisory and Internal Contexts

Module 3: Negotiation in Capital Market Contexts

- Core Principles of Effective Negotiation in Financial Contexts
- Moving Beyond Positional Bargaining in Deal and Advisory Situations
- Keys to Effective Negotiation
- Perspective-Taking to Achieve Sustainable Outcomes
  - Reflection Exercise: Positional Bargaining in Practice
  - The Perspective Challenge: Finding Alignment Across Stakeholders

Module 4: Applied Negotiation Skills in Client and Deal Contexts

- Practising Active Listening in Client and Stakeholder Conversations
- Using Summarising and Clarification to Ensure Shared Understanding
- Making and Managing Requests with Confidence in Professional Contexts
- Applying Negotiation Techniques in Complex Situations
  - Active Listening Exercise: Avoiding Misalignment and Assumptions
  - Assertive Communication Challenge: Making and Managing Requests in Real Scenarios
  - Capstone Simulation: Aligning Sales, Risk, and Compliance to Reach a Defensible Recommendation

Module 5: Action Planning and Wrap-Up

- Key Learning Takeaways
- Personal Commitments for Workplace Application
- Reflection on Learning Objectives
  - Behavioural Change Commitments: Actions That Stick

Trainer's Profile

The trainer brings extensive experience advising capital market regulators and financial services institutions from his consulting career with Deloitte, Ernst & Young, and Arthur Andersen. His capital markets credentials include supporting the Securities Commission Malaysia in the development of the Capital Market Master Plan and contributing to the Kuala Lumpur Stock Exchange's resolution of the script crisis through clearing transaction backlogs under SCANS. He also led multiple strategic and transformation engagements for leading securities firms in China, covering corporate strategy, customer segmentation, brokerage models and large-scale organisation restructuring.

His work in these engagements required extensive engagement with senior stakeholders, regulators and cross-functional leadership teams — shaping strategic decisions, aligning competing interests and driving complex change initiatives. His experience includes investment evaluation, deal structuring and negotiation in financial services, including private equity transactions and market infrastructure initiatives. He has also worked closely with stakeholders on business transformation, strategic alignment and complex decisions involving competing priorities and commercial considerations.

He subsequently held senior leadership roles at SAS Institute and IBM Global Business Services, where he advised banking and financial services clients across ASEAN on analytics-driven strategy, customer management and performance optimisation. In these roles, he regularly engaged C-suite stakeholders to influence strategic priorities, support business decisions and drive adoption of data-led approaches to performance improvement and business execution. He later served as Chief Value Officer at ZICO, leading M&A, investments and enterprise transformation, where stakeholder engagement, negotiation, strategic alignment and value realisation were central to his role. He was subsequently appointed CEO of Shakeup Online, a legaltech venture within the ZICO Group.

With international experience spanning the US, China, Kazakhstan and Central Asia — including an Islamic Development Bank-funded project to transform a conventional bank into an Islamic banking institution — Gary now provides advisory, training and executive coaching. An HRDC Accredited Trainer, he has delivered programmes for major financial institutions including EPF, Alliance Bank, Maybank, CIMB Group, OCBC Bank and Bank Rakyat. His combination of capital markets, consulting, transformation and stakeholder engagement experience enables him to bring practical, real-world perspectives to influencing, negotiation and stakeholder alignment in complex, high-stakes and regulated environments.

PARTICIPANT DETAILS

Name:

Position:

Department:

Contact Number:

Email:

Name:

Position:

Department:

Contact Number:

Email:

ADMIN DETAILS

Name:

Position:

Department:

Company:

Contact Number:

Email:

Address:

Payment Method: ☐ Direct Payment ☐ Claim HRD

Notes:

- *Cancellations made less than 14 days before the training date or non-attendance on the day of training are non-refundable. Substitution is allowed.*
- *Once registration is confirmed, the client is fully liable for the course fee, regardless of whether payment is made directly or through the HRDC grant, and even if participants do not attend the training.*
- *Clients who opt for direct payment must ensure full payment is made before the training date.*
- *HRDC grant applications must be submitted and approved 14 days prior to the training day. The maximum claimable amount is RM1,750 per participant per day. Any shortfall between the approved grant and the course fee must be topped up by the client.*
- *Should the number of confirmed participants be too low to ensure a meaningful learning experience, Symphony reserves the right to postpone or cancel the training.*