QUEST TRAINING

Banking Customer Journey & Experience Design

Retail Banking & Customer Experience · Banking & Finance · 5 Days · Classroom

OVERVIEW

The Banking Customer Journey & Experience Design course is a comprehensive professional development program designed to help banking professionals create customer-centric strategies that enhance service quality, strengthen customer relationships, and improve organizational performance. As customer expectations continue to evolve across retail, corporate, and digital banking, financial institutions must adopt a structured approach to understanding, designing, and continuously improving every interaction throughout the customer lifecycle. This course equips participants with the practical knowledge and strategic frameworks needed to design meaningful banking experiences that support customer satisfaction, loyalty, and long-term business success.

Modern banks operate in an increasingly competitive environment where customer experience has become a key differentiator alongside product innovation, operational efficiency, and regulatory compliance. From onboarding and account management to lending, payments, complaint resolution, and digital engagement, every touchpoint contributes to the overall customer perception of the institution. This course explores how banking organizations can map customer journeys, identify pain points, optimize service delivery, and integrate customer feedback into continuous improvement initiatives while maintaining operational excellence and governance standards.

Participants will examine customer journey mapping methodologies, service design principles, behavioral insights, digital transformation initiatives, and experience management practices specifically tailored for the banking sector. The program also explores how organizational culture, process optimization, technology, and cross-functional collaboration contribute to delivering consistent and seamless banking experiences across physical branches, contact centers, mobile applications, online banking platforms, and relationship management channels.

Through practical case discussions, structured workshops, and real-world banking scenarios, participants will develop actionable approaches for aligning customer experience strategies with business objectives, operational capabilities, and regulatory expectations. By the end of the course, professionals will be equipped to lead customer experience initiatives that improve engagement, strengthen trust, increase customer retention, and support sustainable organizational growth.

OBJECTIVES

- Analyze the complete Banking Customer Journey & Experience Design framework to identify customer needs, expectations, and service improvement opportunities throughout the course.
- Develop comprehensive customer journey maps that accurately represent banking interactions across multiple service channels by the end of the training.
- Evaluate customer touchpoints using structured assessment techniques to identify operational inefficiencies and service gaps.

- Apply customer experience design methodologies to improve banking products, services, and customer engagement processes during practical workshops.
- Design customer-centric service improvement initiatives that align with organizational objectives, compliance requirements, and operational capabilities.
- Improve customer satisfaction by implementing practical techniques for enhancing communication, responsiveness, and service consistency.
- Strengthen collaboration between business units to deliver integrated customer experiences across branch, digital, and support functions.
- Implement customer feedback mechanisms that support continuous service enhancement and evidence-based decision-making.
- Assess the effectiveness of customer experience metrics, performance indicators, and service quality measurements for banking operations.
- Align customer journey strategies with digital transformation initiatives, operational excellence programs, and long-term organizational objectives.

WHO SHOULD ATTEND

This course is designed for banking executives, customer experience managers, retail banking managers, branch managers, relationship managers, customer service managers, operations managers, digital banking professionals, service excellence specialists, business transformation teams, and professionals responsible for improving customer engagement across financial institutions. It is particularly valuable for organizations seeking to strengthen customer loyalty, enhance service delivery, and improve operational performance through customer-focused strategies.

The program is also highly relevant for customer journey specialists, process improvement professionals, quality assurance teams, product managers, business analysts, marketing professionals, CRM specialists, complaints management teams, digital transformation leaders, and organizational development professionals involved in designing or improving customer-facing banking services. Financial institutions, central banks, government entities, public sector financial organizations, and large corporations with customer service functions will benefit from the practical frameworks presented throughout the course.

Additionally, professionals responsible for strategic planning, innovation, operational excellence, customer insights, and service delivery governance will gain valuable techniques for integrating customer journey management into organizational planning while supporting sustainable business growth and improved customer outcomes.

LEARNING OUTCOMES

- By the end of this course, participants will be able to:
- Analyze customer behavior across multiple banking channels to identify opportunities for service improvement.
- Develop detailed customer journey maps that illustrate end-to-end banking interactions.
- Evaluate customer touchpoints to identify pain points, operational bottlenecks, and service inconsistencies.
- Design customer-centric banking experiences that improve engagement, satisfaction, and loyalty.
- Apply service design principles to enhance banking products, processes, and customer communications.

• Implement practical customer feedback systems that support continuous service improvement initiatives.
• Measure customer experience performance using relevant banking metrics and key performance indicators.
• Collaborate effectively across departments to deliver consistent and seamless customer experiences.
• Integrate digital banking capabilities into customer journey improvement initiatives while maintaining service quality.
• Create an actionable customer experience improvement plan that aligns with organizational objectives and operational priorities.

COURSE OUTLINE

1. Course Outline:
2. Day 1: Foundations of Banking Customer Journey & Experience Design
3. Foundations of Banking Customer Journey & Experience Design
4. Understanding customer experience as a strategic priority in banking
5. Principles of Banking Customer Journey & Experience Design
6. Customer expectations in retail, corporate, and digital banking
7. Identifying customer personas, behaviors, and banking needs
8. Practical application: Mapping the current customer journey for selected banking services
9. Day 2: Customer Journey Mapping and Service Design
10. Customer Journey Mapping and Service Design
11. Building comprehensive customer journey maps across banking channels
12. Identifying customer touchpoints, moments of truth, and service gaps
13. Service design methodologies for banking products and customer interactions
14. Understanding customer emotions, expectations, and decision-making processes
15. Practical application: Developing customer journey maps and identifying improvement opportunities
16. Day 3: Enhancing Customer Experience Across Banking Channels
17. Enhancing Customer Experience Across Banking Channels
18. Designing seamless omnichannel banking experiences
19. Improving branch, contact center, online, and mobile banking interactions
20. Integrating customer feedback into service improvement initiatives
21. Leveraging digital transformation to enhance customer engagement
22. Practical application: Evaluating existing customer journeys and redesigning key service touchpoints
23. Day 4: Measuring and Managing Customer Experience Performance
24. Measuring and Managing Customer Experience Performance
25. Customer experience governance and organizational alignment
26. Customer satisfaction measurement techniques and performance indicators
27. Monitoring service quality and continuous improvement processes
28. Managing customer complaints, recovery strategies, and relationship development
29. Practical application: Developing customer experience dashboards and performance improvement plans
30. Day 5: Implementing Banking Customer Journey & Experience Strategies
31. Implementing Banking Customer Journey & Experience Strategies
32. Developing organization-wide customer experience strategies

33. Aligning customer journey initiatives with operational excellence and business objectives
34. Change management considerations for customer experience transformation
35. Building a sustainable culture of customer-centric service excellence
36. Final workshop: Creating a Banking Customer Journey & Experience Design implementation roadmap with measurable objectives, stakeholder responsibilities, performance indicators, and continuous improvement actions for participants' organizations

---

Register or Request More Information

Course page: http://localhost:3000/courses/banking-customer-journey-experience-design
Website: http://localhost:3000
Email: info@example.com
Phone: +44 20 0000 0000