

Course No. 1072

Banking Customer Journey & Experience Design

RETAIL BANKING & CUSTOMER EXPERIENCE
FINANCE, INVESTMENT & BANKING

DURATION

5 Days

LOCATION

Lisbon, Portugal

DELIVERY

Classroom

DATES

7 – 11 Dec 2026



Scheduled Event Details

CITY	Lisbon, Portugal
DATE	7 – 11 Dec 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course 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

DAY 01

Foundations of Banking Customer Journey & Experience Design

- Understanding customer experience as a strategic priority in banking
- Principles of Banking Customer Journey & Experience Design
- Customer expectations in retail, corporate, and digital banking
- Identifying customer personas, behaviors, and banking needs

PRACTICAL APPLICATION

Mapping the current customer journey for selected banking services

DAY 02

Customer Journey Mapping and Service Design

- Building comprehensive customer journey maps across banking channels
- Identifying customer touchpoints, moments of truth, and service gaps
- Service design methodologies for banking products and customer interactions
- Understanding customer emotions, expectations, and decision-making processes

PRACTICAL APPLICATION

Developing customer journey maps and identifying improvement opportunities

DAY 03

Enhancing Customer Experience Across Banking Channels

- Designing seamless omnichannel banking experiences
- Improving branch, contact center, online, and mobile banking interactions
- Integrating customer feedback into service improvement initiatives

DAY 03 — CONTINUED

- Leveraging digital transformation to enhance customer engagement

PRACTICAL APPLICATION

Evaluating existing customer journeys and redesigning key service touchpoints

DAY 04

Measuring and Managing Customer Experience Performance

- Customer experience governance and organizational alignment
- Customer satisfaction measurement techniques and performance indicators
- Monitoring service quality and continuous improvement processes
- Managing customer complaints, recovery strategies, and relationship development

PRACTICAL APPLICATION

Developing customer experience dashboards and performance improvement plans

DAY 05

Implementing Banking Customer Journey & Experience Strategies

- Developing organization-wide customer experience strategies
- Aligning customer journey initiatives with operational excellence and business objectives
- Change management considerations for customer experience transformation
- Building a sustainable culture of customer-centric service excellence

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: <https://quest-training.com/courses/banking-customer-journey-experience-design>

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