

Course No. 1070

Branch Management & Performance

RETAIL BANKING & CUSTOMER EXPERIENCE
FINANCE, INVESTMENT & BANKING

DURATION

5 Days

LOCATION

Lisbon, Portugal

DELIVERY

Classroom

DATES

23 – 27 Nov 2026



Scheduled Event Details

CITY	Lisbon, Portugal
DATE	23 – 27 Nov 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

Branch Management & Performance is a comprehensive professional training course designed to equip banking leaders and branch management professionals with the strategic, operational, and leadership capabilities required to effectively manage high-performing bank branches. In today's competitive banking environment, branch managers play a critical role in achieving business growth, enhancing customer satisfaction, maintaining regulatory compliance, managing operational risks, and leading high-performing teams. Successful branch management requires balancing commercial objectives with operational excellence while delivering consistent and customer-focused banking services.

This course provides participants with an in-depth understanding of branch operations, branch leadership, sales management, customer relationship management, performance measurement, operational controls, workforce management, service quality, branch profitability, and strategic planning. Participants will explore how to optimize branch performance through effective resource allocation, customer engagement, employee development, and continuous operational improvement.

The program also examines the integration of Branch Management & Performance with Retail Banking, Corporate Banking, Customer Experience, Digital Banking, Operational Risk Management, Regulatory Compliance, Human Capital Management, Business Development, and Enterprise Performance Management. Participants will develop practical skills in branch planning, performance coaching, KPI management, productivity analysis, customer service leadership, branch financial performance, and decision-making to improve both operational efficiency and commercial success.

Through practical case studies, branch management simulations, leadership workshops, operational assessments, and performance improvement exercises, participants will strengthen their ability to lead branch teams, optimize branch operations, improve customer service standards, increase

sales productivity, and drive sustainable business growth. By the end of the course, participants will be equipped to implement Branch Management & Performance strategies that strengthen operational excellence, improve customer satisfaction, enhance employee performance, increase profitability, and support long-term organizational success.

Objectives

- Analyze Branch Management & Performance principles and evaluate their contribution to operational excellence and business performance by the end of the course.
- Develop comprehensive branch management strategies that improve operational efficiency, customer satisfaction, and financial performance.
- Evaluate branch performance using Key Performance Indicators (KPIs), balanced scorecards, and operational performance metrics.
- Apply leadership and coaching techniques to improve employee engagement, productivity, and professional development.
- Design branch improvement initiatives that strengthen customer service, operational controls, and sales effectiveness.
- Improve branch profitability through effective resource management, business development, and performance optimization.
- Strengthen governance by implementing regulatory compliance, internal controls, operational risk management, and ethical banking practices.
- Implement performance measurement frameworks to monitor branch productivity, service quality, customer satisfaction, and financial results.
- Assess the impact of digital banking, automation, artificial intelligence, and financial technology on branch operations and performance.
- Align Branch Management & Performance with organizational strategy, customer experience, operational excellence, and sustainable business growth before course completion.

Who Should Attend

This course is designed for Branch Managers, Assistant Branch Managers, Regional Branch Managers, Branch Operations Managers, Retail Banking Managers, Customer Relationship Managers, Customer Service Managers, Sales Managers, Business Development Managers, Branch Supervisors, Banking Operations Professionals, Performance Management Specialists, Human Resources Business Partners, Quality Assurance Managers, and professionals responsible

for branch operations and performance improvement.

The program is equally valuable for Chief Retail Banking Officers, Heads of Branch Networks, Executive Management Teams, Operations Directors, Business Unit Leaders, Customer Experience Managers, Compliance Managers, Operational Risk Managers, Government Banking Professionals, Public Sector Financial Institution Leaders, FinTech Managers, and decision-makers responsible for branch strategy, operational performance, employee development, customer service, and business growth.

Learning Outcomes

- By the end of this course, participants will be able to:
- Develop effective branch management strategies that support organizational objectives.
- Evaluate branch performance using KPIs, productivity indicators, and financial performance measures.
- Lead and coach branch teams to improve employee engagement, accountability, and operational effectiveness.
- Design customer-focused initiatives that improve service quality and customer satisfaction.
- Improve operational efficiency through effective branch planning, process optimization, and resource management.
- Strengthen compliance with banking regulations, operational controls, and risk management requirements.
- Prepare executive branch performance reports that support strategic decision-making and continuous improvement.
- Integrate Branch Management & Performance with Customer Experience, Digital Banking, Operational Excellence, and Enterprise Risk Management.
- Assess the impact of digital transformation, artificial intelligence, automation, and customer analytics on branch performance.
- Develop a practical implementation roadmap that improves branch productivity, strengthens leadership capabilities, enhances customer satisfaction, increases profitability, optimizes operational performance, and supports sustainable institutional growth.

Course Outline

DAY 01

Foundations of Branch Management

- Strategic role of bank branches in modern banking
- Roles and responsibilities of branch managers
- Branch operating models and organizational structure
- Branch planning and resource allocation

PRACTICAL APPLICATION

Evaluating branch performance and identifying improvement opportunities

DAY 02

Leadership and Performance Management

- Leadership skills for branch managers
- Team development, coaching, and employee engagement
- Performance management frameworks
- Key Performance Indicators (KPIs) and branch scorecards

PRACTICAL APPLICATION

Developing branch performance improvement plans

DAY 03

Operational Excellence and Customer Service

- Branch operations management
- Customer experience and service excellence
- Sales management and business development
- Complaint handling and customer retention strategies

DAY 03 — CONTINUED

PRACTICAL APPLICATION

Designing customer service and branch productivity initiatives

DAY 04**Governance, Risk Management, and Digital Banking**

- Regulatory compliance and internal controls
- Operational risk management in branch operations
- Digital banking transformation and smart branches
- Business continuity and operational resilience

PRACTICAL APPLICATION

Developing a branch governance and operational control framework

DAY 05**Building High-Performing Banking Branches**

- International best practices in branch management
- Financial performance and branch profitability
- Continuous improvement and innovation
- Strategic planning for future-ready branches

FINAL WORKSHOP

Developing a comprehensive Branch Management & Performance implementation plan that includes branch leadership, operational excellence, customer experience, sales strategy, workforce development, regulatory compliance, operational risk management, digital transformation, performance measurement, continuous improvement, and governance practices to improve productivity, strengthen customer relationships, increase profitability, and support sustainable banking success.



Register or Request More Information

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