QUEST Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1068

Customer Experience Excellence in Banking

RETAIL BANKING & CUSTOMER EXPERIENCE
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Online, Online

DATES
3 – 7 Jan 2027

Scheduled Event Details

CITY	Online, Online
DATE	3 – 7 Jan 2027
DELIVERY TYPE	Classroom
COURSE FEE	€1,700

Course Overview

Customer Experience Excellence in Banking is a comprehensive professional training course designed to equip banking professionals with the strategic knowledge, practical methodologies, and leadership capabilities required to design, manage, and continuously improve customer experiences across all banking channels. In today's highly competitive financial services industry, customer experience has become a key differentiator that directly influences customer loyalty, retention, profitability, brand reputation, and long-term organizational success.

This course provides participants with a comprehensive understanding of customer-centric banking, customer journey management, service excellence, customer behavior, customer segmentation, relationship management, service quality frameworks, customer engagement, complaint management, and omnichannel banking experiences. Participants will explore how financial institutions can deliver consistent, personalized, and seamless customer interactions while balancing operational efficiency, regulatory compliance, and business performance.

The program also examines the integration of Customer Experience Excellence with Retail Banking, Corporate Banking, Digital Banking, Branch Operations, Contact Centers, Product Development, Marketing, Customer Relationship Management (CRM), and Enterprise Risk Management. Participants will develop practical skills in customer journey mapping, Voice of the Customer (VoC) programs, customer satisfaction measurement, Net Promoter Score (NPS), customer feedback analysis, service recovery strategies, employee engagement, and continuous service improvement.

Through practical case studies, customer journey workshops, service design exercises, role-playing scenarios, and real-world banking simulations, participants will strengthen their ability to identify customer pain points, redesign service processes, improve customer interactions, and build a customer-centric culture throughout the organization. By the end of the course, participants will be equipped to implement Customer Experience Excellence strategies that enhance customer satisfaction, strengthen customer loyalty, improve operational performance, and support sustainable business growth.

Objectives

- Analyze Customer Experience Excellence principles and evaluate their impact on customer satisfaction and organizational performance by the end of the course.
- Develop customer-centric strategies that enhance service quality across retail, corporate, and digital banking channels.
- Evaluate customer expectations, behaviors, and service requirements using structured customer experience methodologies.
- Apply customer journey mapping and service design techniques to improve customer interactions and operational efficiency.
- Design customer engagement initiatives that strengthen loyalty, trust, and long-term banking relationships.
- Improve complaint handling, service recovery, and customer communication processes through internationally recognized best practices.
- Strengthen governance by implementing customer protection standards, regulatory compliance, service quality controls, and ethical banking practices.
- Implement Key Performance Indicators (KPIs), Customer Satisfaction (CSAT), Net Promoter Score (NPS), Customer Effort Score (CES), and Voice of the Customer (VoC) metrics to evaluate customer experience performance.
- Assess emerging trends in digital banking, artificial intelligence, personalization, customer analytics, financial technology, and omnichannel service delivery.
- Align Customer Experience Excellence with Retail Banking, Corporate Banking, Digital Transformation, Operational Excellence, and strategic organizational objectives before course completion.

Who Should Attend

This course is designed for Customer Experience Managers, Branch Managers, Customer Relationship Managers, Retail Banking Managers, Corporate Banking Managers, Contact Center Managers, Customer Service Managers, Branch Operations Managers, Product Managers, Digital Banking Managers, Marketing Managers, Business Development Managers, Service Quality Managers, CRM Specialists, Customer Insights Analysts, Banking Operations Professionals, and employees responsible for customer-facing banking services.

The program is equally valuable for Chief Customer Officers, Chief Retail Banking Officers, Executive Management Teams, Customer Experience Directors, Heads of Branch Networks, Digital Transformation Leaders, Strategy Managers, Human Resources Managers, Learning and Development Professionals, Government Banking Specialists, Public Sector Banking Professionals, FinTech Executives, and decision-makers responsible for customer strategy, service excellence, operational performance, and organizational transformation.

Learning Outcomes

- By the end of this course, participants will be able to:
- Develop customer experience strategies aligned with organizational objectives and customer expectations.
- Evaluate customer journeys and identify opportunities to improve service quality across all banking channels.
- Apply customer-centric design principles to create seamless and personalized banking experiences.
- Improve complaint resolution and service recovery processes that strengthen customer trust and loyalty.
- Design customer engagement programs that increase retention, cross-selling opportunities, and long-term profitability.
- Implement customer experience measurement frameworks using KPIs, CSAT, NPS, CES, and Voice of the Customer methodologies.
- Prepare executive customer experience reports that support strategic decision-making and continuous improvement.
- Integrate Customer Experience Excellence with Digital Banking, Customer Relationship Management, Operational Excellence, and Enterprise Risk Management.
- Assess the impact of digital transformation, artificial intelligence, customer analytics, and financial technology on customer experience strategies.
- Develop a practical implementation roadmap to strengthen customer-centric culture, improve service delivery, optimize customer engagement, increase operational efficiency, enhance customer loyalty, and support sustainable institutional growth.

Course Outline

DAY 01

Foundations of Customer Experience Excellence

- Customer-centric banking principles
- Evolution of customer experience in financial services
- Customer expectations and behavioral insights
- Customer segmentation and journey mapping

PRACTICAL APPLICATION

Mapping the end-to-end banking customer journey

DAY 02

Designing Exceptional Banking Experiences

- Service design methodologies
- Customer engagement strategies
- Personalized banking solutions
- Omnichannel customer experience

PRACTICAL APPLICATION

Designing seamless customer service experiences

DAY 03

Customer Relationship Management and Service Quality

- Customer Relationship Management (CRM)
- Voice of the Customer (VoC) programs
- Complaint management and service recovery
- Service quality improvement frameworks

DAY 03 — CONTINUED

PRACTICAL APPLICATION

Developing customer improvement initiatives

DAY 04

Governance, Digital Transformation, and Performance Measurement

- Customer protection and regulatory compliance
- Digital banking and customer experience technologies
- Artificial intelligence and customer analytics
- Performance measurement using KPIs, CSAT, NPS, and CES

PRACTICAL APPLICATION

Building customer experience performance dashboards

DAY 05

Building a Customer-Centric Banking Culture

- International best practices in banking customer experience
- Leadership for customer-centric transformation
- Continuous improvement and innovation in banking services
- Employee engagement and service excellence culture

FINAL WORKSHOP

Developing a comprehensive Customer Experience Excellence in Banking implementation plan that includes customer journey analysis, service design, customer engagement strategies, complaint management, digital banking integration, customer analytics, regulatory compliance, performance measurement, employee engagement, continuous improvement initiatives, and governance practices to strengthen customer satisfaction, improve service quality, increase customer loyalty, enhance operational performance, and support sustainable banking growth.

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Register or Request More Information

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