QUEST TRAINING

Customer Relationship Management for Banks

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

OVERVIEW

Customer Relationship Management for Banks is a comprehensive professional training course designed to equip banking professionals with the strategic knowledge, relationship management skills, and customer engagement capabilities required to build lasting customer relationships and drive sustainable business growth. In today's highly competitive banking environment, Customer Relationship Management (CRM) has become a strategic business function that enables financial institutions to improve customer loyalty, increase profitability, deliver personalized banking solutions, and strengthen long-term customer value.

This course provides participants with an in-depth understanding of Customer Relationship Management principles, customer lifecycle management, customer segmentation, relationship development, customer needs analysis, sales and service integration, customer retention strategies, complaint management, customer profitability analysis, and digital customer engagement. Participants will learn how to leverage CRM strategies to deliver exceptional customer experiences while supporting organizational objectives, regulatory compliance, and operational excellence.

The program also explores the integration of Customer Relationship Management with Retail Banking, Corporate Banking, Digital Banking, Branch Management, Customer Experience, Marketing, Business Development, Data Analytics, Financial Technology (FinTech), Operational Risk Management, and Regulatory Compliance. Participants will develop practical skills in relationship planning, customer portfolio management, customer communication, consultative selling, customer data utilization, performance measurement, and strategic decision-making to maximize customer value and institutional performance.

Through practical case studies, customer journey workshops, CRM simulations, relationship planning exercises, and real-world banking scenarios, participants will strengthen their ability to build trusted customer relationships, improve customer satisfaction, enhance service delivery, identify cross-selling opportunities, and implement customer-centric strategies. By the end of the course, participants will be equipped to implement Customer Relationship Management for Banks initiatives that improve customer loyalty, optimize business performance, increase revenue, and support long-term organizational success.

OBJECTIVES

- Analyze Customer Relationship Management principles and evaluate their contribution to customer loyalty, business growth, and organizational performance by the end of the course.
- Develop customer relationship strategies that strengthen long-term customer engagement and retention.
- Evaluate customer financial needs and recommend personalized banking products and financial

solutions.
• Apply customer segmentation, customer lifecycle management, and relationship planning techniques to improve customer value.
• Design customer engagement initiatives that improve service quality, customer satisfaction, and relationship profitability.
• Improve customer communication, consultative selling, negotiation, and relationship-building skills.
• Strengthen governance by implementing customer protection standards, regulatory compliance, ethical banking practices, and operational controls.
• Implement Key Performance Indicators (KPIs), customer satisfaction metrics, relationship management scorecards, and customer profitability measures to evaluate CRM performance.
• Assess the impact of digital transformation, artificial intelligence, customer analytics, financial technology, and omnichannel banking on customer relationship management.
• Align Customer Relationship Management strategies with Retail Banking, Corporate Banking, Customer Experience, Business Development, and strategic organizational objectives before course completion.

WHO SHOULD ATTEND

This course is designed for Customer Relationship Managers, Relationship Officers, Branch Managers, Assistant Branch Managers, Retail Banking Managers, Corporate Banking Managers, Customer Service Managers, Sales Managers, Business Development Managers, Product Managers, Wealth Advisors, Customer Experience Specialists, Marketing Professionals, CRM Specialists, Banking Operations Professionals, and employees responsible for managing customer relationships and delivering banking services.

The program is equally valuable for Chief Customer Officers, Chief Retail Banking Officers, Heads of Relationship Management, Executive Management Teams, Customer Experience Directors, Regional Banking Managers, Strategy Managers, Digital Banking Leaders, Government Banking Professionals, Public Sector Financial Institution Managers, FinTech Executives, and decision-makers responsible for customer engagement, customer retention, relationship management, service excellence, and business growth.

LEARNING OUTCOMES

• By the end of this course, participants will be able to:
• Develop strategic Customer Relationship Management plans that support organizational objectives and customer-centric banking.
• Evaluate customer needs and recommend suitable financial products and advisory solutions.
• Apply customer segmentation, relationship planning, and customer lifecycle management methodologies.
• Design customer engagement initiatives that improve loyalty, retention, and long-term profitability.
• Improve customer communication, consultative selling, and relationship-building capabilities.
• Strengthen compliance with customer protection regulations, operational controls, and ethical banking standards.
• Prepare executive CRM reports using KPIs, customer satisfaction metrics, customer profitability analysis, and relationship scorecards.
• Integrate Customer Relationship Management with Customer Experience, Digital Banking, Business Development, Operational Excellence, and Enterprise Risk Management.
• Assess the impact of artificial intelligence, customer analytics, financial technology, and digital

transformation on relationship management strategies.
• Develop a practical implementation roadmap to strengthen customer relationships, improve customer satisfaction, enhance service quality, increase cross-selling opportunities, optimize customer profitability, and support sustainable banking growth.

COURSE OUTLINE

1. Course Outline:
2. Day 1: Foundations of Customer Relationship Management in Banking
3. Foundations of Customer Relationship Management in Banking
4. Strategic role of CRM in banking
5. Customer-centric banking principles
6. Customer segmentation and customer lifecycle management
7. Understanding customer financial needs
8. Practical application: Customer segmentation and relationship planning
9. Day 2: Building Strong Customer Relationships
10. Building Strong Customer Relationships
11. Customer communication and relationship-building skills
12. Consultative selling and financial advisory techniques
13. Customer engagement and retention strategies
14. Complaint management and service recovery
15. Practical application: Conducting effective customer relationship meetings
16. Day 3: Customer Experience and Business Growth
17. Customer Experience and Business Growth
18. Customer experience management
19. Cross-selling and up-selling opportunities
20. Customer profitability analysis
21. Portfolio management and relationship development
22. Practical application: Developing customer growth strategies
23. Day 4: Governance, Digital CRM, and Performance Measurement
24. Governance, Digital CRM, and Performance Measurement
25. Customer protection and regulatory compliance
26. Digital CRM platforms and omnichannel engagement
27. Artificial intelligence and customer analytics
28. Performance measurement using KPIs, customer satisfaction metrics, and CRM scorecards
29. Practical application: Building CRM performance dashboards
30. Day 5: Building Sustainable Customer Relationships
31. Building Sustainable Customer Relationships
32. International best practices in banking relationship management
33. Leadership in customer-centric organizations
34. Continuous improvement and innovation in CRM
35. Strategic planning for customer relationship excellence
36. Final workshop: Developing a comprehensive Customer Relationship Management for Banks implementation plan that includes customer segmentation, relationship planning, customer engagement, customer experience enhancement, consultative selling, portfolio management, digital CRM integration, regulatory compliance, customer analytics, performance measurement, continuous improvement initiatives, and governance practices to strengthen customer loyalty, improve customer satisfaction, increase profitability, and support sustainable banking success.

Register or Request More Information

Course page: http://localhost:3000/courses/customer-relationship-management-for-banks
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