

Course No. 1013

Operational Excellence in Banking

**BANKING OPERATIONS & SERVICES
FINANCE, INVESTMENT & BANKING**

DURATION

5 Days

LOCATION

Lisbon, Portugal

DELIVERY

Classroom

DATES

19 – 23 Oct 2026



Scheduled Event Details

CITY	Lisbon, Portugal
DATE	19 – 23 Oct 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

Operational Excellence in Banking is a comprehensive professional training course designed to help banking professionals build high-performing operational environments that enhance efficiency, improve customer experience, strengthen governance, and support sustainable organizational growth. In today's rapidly evolving financial sector, banks are expected to deliver faster services, maintain strict regulatory compliance, manage operational risks effectively, and continuously improve productivity while meeting increasing customer expectations. Achieving operational excellence has become a strategic priority for financial institutions seeking to improve performance, optimize resources, and remain competitive in a dynamic marketplace.

This course provides participants with a practical understanding of the principles, methodologies, and best practices that drive operational excellence across banking institutions. It explores the integration of operational strategy, process optimization, quality management, performance measurement, risk management, digital transformation, and customer-centric service delivery. Participants will learn how efficient banking operations contribute to organizational resilience, cost optimization, regulatory compliance, and long-term business success.

Special emphasis is placed on continuous improvement methodologies, operational governance, internal controls, Lean process improvement, workflow optimization, automation, performance analytics, and operational risk management. Participants will examine how emerging technologies, digital banking platforms, artificial intelligence, and data-driven decision-making are transforming banking operations while creating new opportunities to improve service quality and operational efficiency.

By combining operational management, quality improvement, innovation, and strategic leadership, Operational Excellence in Banking equips professionals with practical tools to improve operational performance, streamline banking processes, strengthen organizational capabilities, and build a

culture of continuous improvement. The course enables participants to implement sustainable operational excellence initiatives that support customer satisfaction, regulatory compliance, and strategic business objectives.

Objectives

- Analyze the principles and organizational drivers of operational excellence in banking by the end of the course.
- Apply continuous improvement methodologies to optimize banking processes and improve operational efficiency.
- Evaluate operational performance using measurable key performance indicators and operational analytics.
- Develop operational excellence strategies that enhance productivity, customer experience, and organizational performance.
- Assess operational risks and implement governance and internal control frameworks that strengthen operational resilience.
- Design process improvement initiatives that eliminate inefficiencies, reduce operational waste, and improve service delivery.
- Improve cross-functional collaboration between banking operations, customer service, compliance, risk management, and technology teams.
- Strengthen operational quality through the implementation of standardized procedures and performance management systems.
- Implement digital transformation initiatives, automation, and data-driven operational improvements within banking environments.
- Align operational excellence programmes with organizational strategy, regulatory requirements, and international banking best practices.

Who Should Attend

This course is designed for professionals responsible for improving operational performance, managing banking operations, and leading continuous improvement initiatives within banks and financial institutions. It is particularly valuable for operations managers, branch managers, operational excellence managers, quality managers, business process improvement specialists, customer service managers, banking operations supervisors, and performance management professionals.

The programme also benefits professionals working in operational risk, compliance, internal audit, internal control, digital transformation, business excellence, strategy, customer experience, project management, and organizational development. Department heads, senior executives, transformation leaders, and decision makers responsible for operational strategy, governance, organizational performance, and banking modernization will gain practical knowledge to drive sustainable operational excellence across their institutions.

Learning Outcomes

- By the end of this Operational Excellence in Banking course, participants will be able to:
- Analyze banking operational processes and identify opportunities for continuous improvement.
- Apply operational excellence principles to improve efficiency, productivity, and service quality.
- Evaluate operational performance using key performance indicators and business analytics.
- Design process improvement initiatives that optimize workflows and eliminate operational inefficiencies.
- Implement governance, compliance, and internal control practices that strengthen operational effectiveness.
- Apply operational risk management principles to improve resilience and business continuity.
- Utilize digital banking technologies and automation to improve operational performance.
- Strengthen customer experience through operational improvements and service excellence initiatives.
- Lead operational excellence projects that support organizational transformation and strategic objectives.
- Develop comprehensive action plans for implementing operational excellence frameworks within banking organizations.

Course Outline

DAY 01

Foundations of Operational Excellence in Banking

- Principles of operational excellence in financial institutions
- Operational strategy and organizational alignment
- Banking operational models and value chain analysis
- Customer-centric operations and service excellence

PRACTICAL APPLICATION

Mapping banking operational processes and identifying improvement opportunities

DAY 02

Process Optimization and Performance Management

- Business process analysis and workflow optimization
- Lean principles and continuous improvement methodologies
- Performance measurement using key performance indicators
- Quality management systems in banking operations

PRACTICAL APPLICATION

Evaluating operational performance and redesigning key banking processes

DAY 03

Risk Management, Governance, and Operational Controls

- Operational risk management and mitigation strategies
- Governance frameworks and internal control systems
- Regulatory compliance and operational accountability
- Business continuity and operational resilience

DAY 03 — CONTINUED

PRACTICAL APPLICATION

Conducting operational risk assessments and strengthening governance practices

DAY 04**Digital Transformation and Innovation in Banking Operations**

- Digital banking transformation and operational modernization
- Process automation and intelligent workflow solutions
- Data analytics and operational decision-making
- Emerging technologies shaping banking operations

PRACTICAL APPLICATION

Designing a digital operational excellence initiative

DAY 05**Leadership and Sustaining Operational Excellence**

- Leading operational excellence programmes and change initiatives
- Building a culture of continuous improvement and accountability
- Strategic alignment of operational excellence with business objectives
- Future trends in banking operations and operational excellence

FINAL WORKSHOP

Developing a comprehensive Operational Excellence in Banking implementation roadmap that integrates process optimization, performance improvement, governance, digital transformation, and customer service excellence.



Register or Request More Information

Course page: <https://quest-training.com/courses/operational-excellence-in-banking>

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