QUEST TRAINING

Retail Banking Management

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

OVERVIEW

Retail Banking Management is a comprehensive professional training course designed to equip banking professionals with the knowledge, leadership capabilities, and strategic management skills required to successfully manage retail banking operations, customer relationships, product portfolios, branch performance, and digital banking services. As customer expectations, regulatory requirements, and technological innovation continue to reshape the banking industry, retail banks must deliver exceptional customer experiences while maintaining operational excellence, profitability, and regulatory compliance.

This course provides participants with an in-depth understanding of retail banking business models, customer segmentation, branch management, retail banking products, consumer lending, deposits, mortgages, payment solutions, digital banking, wealth services, customer relationship management, and sales performance. Participants will examine how retail banking strategies align with organizational objectives while creating value for customers through personalized financial solutions, efficient service delivery, and innovative banking channels.

The program also explores the integration of Retail Banking Management with customer experience, digital transformation, operational excellence, risk management, regulatory compliance, financial performance, product development, and business growth. Participants will develop practical skills in branch leadership, sales management, service quality improvement, customer profitability analysis, performance measurement, workforce management, and strategic decision-making to strengthen competitive advantage in today's dynamic banking environment.

Through practical case studies, branch management simulations, customer journey workshops, sales planning exercises, and real-world banking scenarios, participants will strengthen their ability to improve customer satisfaction, optimize branch performance, increase product penetration, manage operational risks, and enhance overall retail banking performance. By the end of the course, participants will be equipped to implement effective Retail Banking Management strategies that support customer loyalty, operational efficiency, sustainable revenue growth, and long-term institutional success.

OBJECTIVES

- Analyze Retail Banking Management principles and evaluate their contribution to sustainable banking performance by the end of the course.
- Develop comprehensive retail banking strategies that improve customer acquisition, retention, and profitability.
- Evaluate customer needs and recommend appropriate retail banking products and financial solutions.
- Apply customer relationship management and consultative sales techniques to enhance customer

experience.
- Design branch performance improvement plans that strengthen operational efficiency and service excellence.
- Improve retail banking performance through effective sales management, workforce development, and customer engagement.
- Strengthen governance by implementing regulatory compliance, consumer protection, operational controls, and risk management practices.
- Implement Key Performance Indicators (KPIs), customer satisfaction metrics, and branch performance measures to evaluate business results.
- Assess emerging trends in digital banking, financial technology, artificial intelligence, open banking, and omnichannel banking services.
- Align Retail Banking Management with strategic business objectives, digital transformation initiatives, operational excellence, and customer-centric banking before course completion.

WHO SHOULD ATTEND

This course is designed for Retail Banking Managers, Branch Managers, Assistant Branch Managers, Customer Relationship Managers, Retail Sales Managers, Branch Operations Managers, Customer Service Managers, Product Managers, Consumer Lending Managers, Deposit Product Specialists, Business Development Managers, Banking Operations Professionals, Digital Banking Specialists, Marketing Managers, Wealth Advisors, and professionals responsible for retail banking operations and customer service.

The program is equally valuable for Chief Retail Banking Officers, Regional Banking Managers, Heads of Branch Networks, Executive Management Teams, Customer Experience Leaders, Business Unit Directors, Strategy Managers, Financial Institution Executives, Government Banking Professionals, Public Sector Banking Specialists, FinTech Managers, and decision-makers responsible for retail banking strategy, branch performance, customer engagement, business growth, and operational excellence.

LEARNING OUTCOMES

- By the end of this course, participants will be able to:
- Develop strategic Retail Banking Management plans aligned with organizational objectives.
- Evaluate customer financial needs and recommend suitable retail banking products and advisory solutions.
- Apply customer relationship management techniques to improve customer loyalty and long-term engagement.
- Design branch performance improvement initiatives that enhance operational efficiency and profitability.
- Improve sales performance through consultative selling, cross-selling, and customer-focused service strategies.
- Strengthen regulatory compliance, consumer protection, operational risk management, and internal controls.
- Prepare executive reports using KPIs, branch performance scorecards, customer satisfaction metrics, and profitability analysis.
- Integrate Retail Banking Management with digital banking, customer experience, operational excellence, and enterprise risk management.
- Assess the impact of financial technology, artificial intelligence, digital transformation, and data

analytics on retail banking operations.
• Develop a practical implementation roadmap to improve retail banking performance, strengthen customer relationships, enhance service quality, optimize branch operations, increase profitability, and support sustainable institutional growth.

COURSE OUTLINE

1. Course Outline:
2. Day 1: Foundations of Retail Banking Management
3. Foundations of Retail Banking Management
4. Evolution and strategic role of retail banking
5. Retail banking business models
6. Customer segmentation and financial needs analysis
7. Retail banking products and services
8. Practical application: Assessing customer segments and retail banking opportunities
9. Day 2: Customer Experience and Retail Banking Solutions
10. Customer Experience and Retail Banking Solutions
11. Customer relationship management
12. Customer journey mapping
13. Consumer lending and deposit products
14. Personalized financial solutions
15. Practical application: Designing customer-centric banking solutions
16. Day 3: Branch Performance and Sales Management
17. Branch Performance and Sales Management
18. Branch leadership and operational management
19. Sales planning and performance management
20. Cross-selling and customer retention strategies
21. Workforce development and coaching
22. Practical application: Developing branch performance improvement plans
23. Day 4: Governance, Risk Management, and Digital Banking
24. Governance, Risk Management, and Digital Banking
25. Regulatory compliance and consumer protection
26. Operational risk management in retail banking
27. Digital banking platforms and omnichannel service delivery
28. Financial technology and innovation
29. Practical application: Building a compliant and digitally enabled retail banking framework
30. Day 5: Building High-Performance Retail Banking Operations
31. Building High-Performance Retail Banking Operations
32. International best practices in retail banking
33. Customer profitability and performance measurement
34. Continuous improvement and service excellence
35. Strategic planning for retail banking growth
36. Final workshop: Developing a comprehensive Retail Banking Management implementation plan that includes customer segmentation, branch performance optimization, customer relationship management, product development, sales strategy, digital banking integration, regulatory compliance, operational risk management, performance measurement, customer experience enhancement, and continuous improvement initiatives to strengthen customer loyalty, improve operational efficiency, increase profitability, and support sustainable banking growth.

Register or Request More Information

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