QUEST TRAINING

Retail Banking Sales & Service

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

OVERVIEW

Retail Banking Sales & Service is a comprehensive professional training course designed to equip banking professionals with the knowledge, customer engagement skills, and sales capabilities required to deliver exceptional retail banking services while achieving sustainable business growth. In today's rapidly evolving banking environment, retail banking professionals are expected to balance customer satisfaction, regulatory compliance, operational excellence, and sales performance to build long-term customer relationships and maximize customer lifetime value.

This course provides participants with a structured understanding of retail banking products and services, customer relationship management, consultative selling, customer needs analysis, branch sales strategies, customer service excellence, complaint handling, cross-selling, up-selling, customer retention, and service quality management. Participants will learn how to identify customer financial needs, recommend suitable banking solutions, and create personalized experiences that strengthen trust, loyalty, and long-term engagement.

The program also explores the integration of Retail Banking Sales & Service with customer experience management, digital banking, branch operations, consumer lending, deposit products, payment services, wealth solutions, regulatory compliance, operational risk management, and performance management. Participants will develop practical skills in customer communication, sales planning, relationship building, service recovery, negotiation, customer profitability analysis, and performance measurement to improve both customer outcomes and organizational performance.

Through practical case studies, role-playing exercises, branch sales simulations, customer journey workshops, and interactive discussions, participants will strengthen their ability to deliver outstanding customer service, increase product penetration, improve sales effectiveness, and build lasting customer relationships. By the end of the course, participants will be equipped to implement Retail Banking Sales & Service strategies that enhance customer satisfaction, improve branch productivity, increase revenue, and support sustainable banking success.

OBJECTIVES

- Analyze Retail Banking Sales & Service principles and evaluate their contribution to customer satisfaction and business performance by the end of the course.
- Develop customer-focused sales strategies that improve customer acquisition, retention, and long-term profitability.
- Evaluate customer financial needs and recommend suitable retail banking products and financial solutions.
- Apply consultative selling techniques to improve customer engagement and increase product penetration.

- Design branch sales and service improvement plans that strengthen operational performance and customer experience.
- Improve customer communication, negotiation, complaint handling, and relationship management skills.
- Strengthen governance by implementing regulatory compliance, consumer protection standards, ethical banking practices, and operational controls.
- Implement Key Performance Indicators (KPIs), customer satisfaction metrics, sales performance indicators, and service quality measures to monitor business performance.
- Assess emerging trends in digital banking, financial technology, customer analytics, artificial intelligence, and omnichannel banking services.
- Align Retail Banking Sales & Service with Retail Banking Management, Customer Experience, Digital Banking, Operational Excellence, and strategic business objectives before course completion.

WHO SHOULD ATTEND

This course is designed for Branch Managers, Assistant Branch Managers, Retail Banking Managers, Customer Relationship Managers, Customer Service Managers, Retail Sales Managers, Banking Advisors, Personal Bankers, Consumer Lending Officers, Deposit Product Specialists, Branch Operations Managers, Contact Center Professionals, Product Managers, Business Development Managers, Customer Experience Specialists, Banking Operations Professionals, and employees responsible for customer-facing banking services.

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

LEARNING OUTCOMES

- By the end of this course, participants will be able to:
- Develop customer-focused retail banking sales and service strategies that support organizational objectives.
- Evaluate customer financial needs and recommend appropriate banking products and advisory solutions.
- Apply consultative selling and customer communication techniques to improve customer engagement and sales performance.
- Design branch sales initiatives that improve customer acquisition, retention, and profitability.
- Improve complaint resolution and service recovery processes that strengthen customer loyalty and trust.
- Strengthen compliance with consumer protection requirements, operational controls, and ethical banking standards.
- Prepare executive reports using KPIs, sales dashboards, customer satisfaction metrics, and branch performance scorecards.
- Integrate Retail Banking Sales & Service with Customer Experience Management, Digital Banking, Relationship Management, and Operational Excellence.
- Assess the impact of digital transformation, artificial intelligence, customer analytics, and financial technology on retail banking sales and service.

• Develop a practical implementation roadmap to improve customer service quality, strengthen sales performance, increase operational efficiency, enhance customer loyalty, optimize branch productivity, and support sustainable banking growth.

COURSE OUTLINE

1. Course Outline:
2. Day 1: Foundations of Retail Banking Sales & Service
3. Foundations of Retail Banking Sales & Service
4. Evolution of retail banking and customer expectations
5. Retail banking products and customer value proposition
6. Customer segmentation and financial needs analysis
7. Principles of consultative selling
8. Practical application: Identifying customer needs and recommending banking solutions
9. Day 2: Customer Engagement and Sales Excellence
10. Customer Engagement and Sales Excellence
11. Building long-term customer relationships
12. Customer communication and negotiation skills
13. Cross-selling and up-selling strategies
14. Personalized banking services
15. Practical application: Conducting effective customer advisory conversations
16. Day 3: Branch Performance and Service Quality
17. Branch Performance and Service Quality
18. Branch sales planning and performance management
19. Customer experience and service quality improvement
20. Complaint handling and service recovery
21. Customer retention and loyalty strategies
22. Practical application: Developing branch sales and service improvement plans
23. Day 4: Governance, Digital Banking, and Performance Measurement
24. Governance, Digital Banking, and Performance Measurement
25. Regulatory compliance and consumer protection
26. Operational risk management in retail banking
27. Digital banking channels and omnichannel customer engagement
28. Performance measurement using KPIs, sales metrics, and customer satisfaction indicators
29. Practical application: Building sales and service performance dashboards
30. Day 5: Building High-Performance Retail Banking Teams
31. Building High-Performance Retail Banking Teams
32. International best practices in retail banking sales and service
33. Leadership and coaching for branch success
34. Continuous improvement and customer-centric culture
35. Innovation in retail banking services
36. Final workshop: Developing a comprehensive Retail Banking Sales & Service implementation plan that includes customer segmentation, financial needs analysis, consultative selling, customer relationship management, branch sales strategy, customer experience enhancement, digital banking integration, regulatory compliance, operational risk controls, performance measurement, employee development, and continuous improvement initiatives to strengthen customer satisfaction, increase sales effectiveness, improve branch performance, and support sustainable banking growth.

Register or Request More Information

Course page: http://localhost:3000/courses/retail-banking-sales-service
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