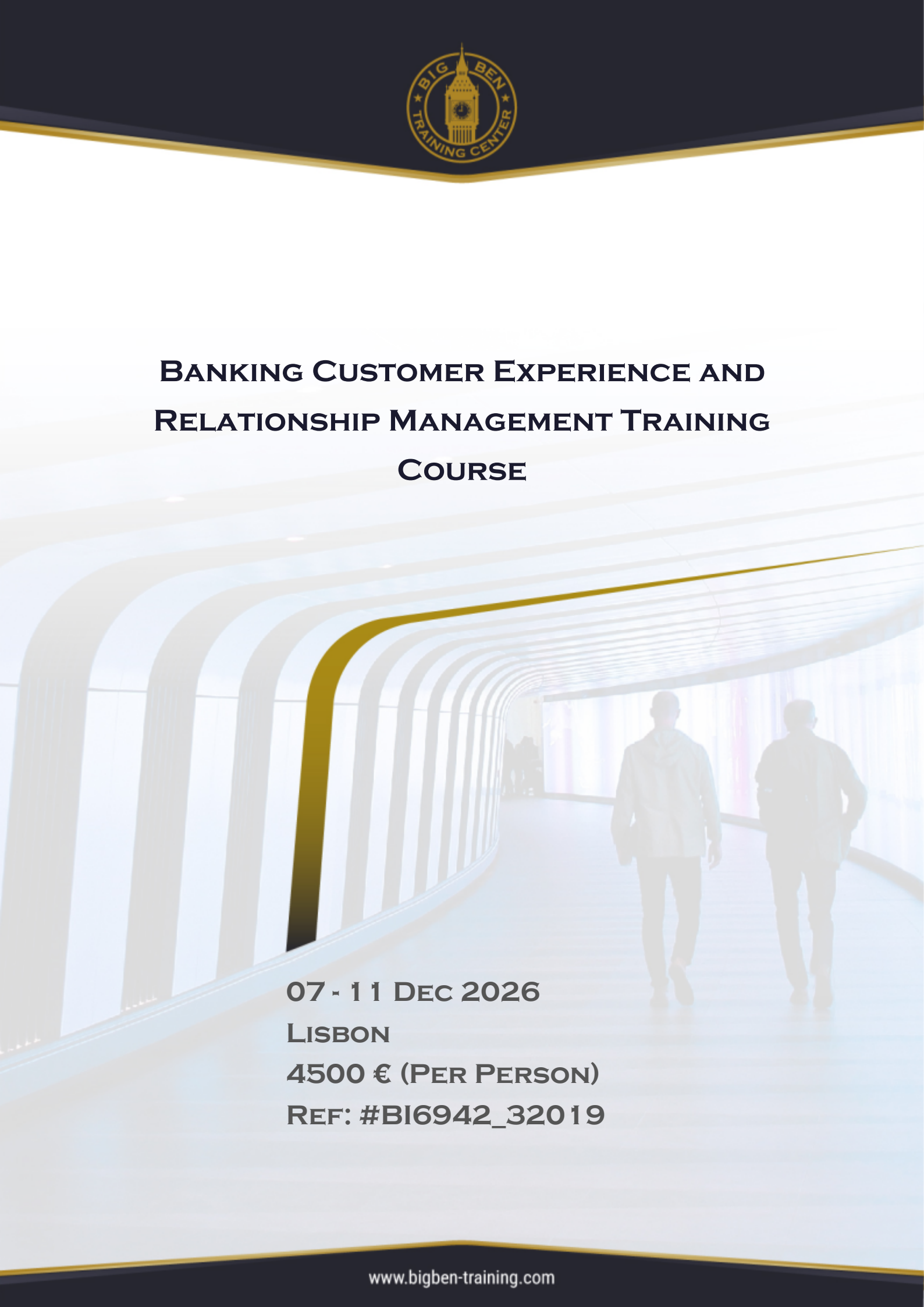
Banking Customer Experience and Relationship Management Training Course



07 - 11 Dec 2026

Lisbon

4500 € (Per Person)

Ref: #BI6942_32019

Course Introduction / Overview:

In today's hyper-competitive financial landscape, customer experience (CX) has emerged as the primary differentiator for banking institutions. This course provides a comprehensive framework for understanding, designing, and delivering exceptional customer experiences that foster loyalty and drive growth. We will explore the critical intersection of technology, human interaction, and strategic relationship management. The curriculum moves beyond theoretical concepts to offer practical, actionable strategies for transforming every customer touchpoint, from digital onboarding to in-person branch interactions. Drawing upon foundational service quality principles, such as those outlined by A. Parasuraman and his colleagues in their seminal work on the SERVQUAL model, participants will learn to identify and close the gaps between customer expectations and service delivery. This program, offered by BIG BEN Training Center, is meticulously designed to equip banking professionals with the skills to build lasting, profitable customer relationships, ensuring their institution not only survives but thrives in the age of the customer. Participants will gain a deep understanding of how to create a seamless omnichannel experience, leverage data for personalization, and cultivate a truly customer-centric culture throughout their organization.

Target Audience / This training course is suitable for:

- Customer Experience (CX) Managers and Specialists.
- Branch Managers and Assistant Branch Managers.
- Customer Relationship Managers (CRMs).
- Retail and Corporate Banking Officers.
- Client Service and Support Team Leaders.
- Digital Banking and Innovation Teams.
- Marketing and Product Development Professionals.
- Operations Managers responsible for customer-facing processes.
- Wealth Management Advisors.
- Training and Development Managers in the financial sector.

Target Sectors and Industries:

- Retail Banking.
- Corporate and Commercial Banking.
- Private Banking and Wealth Management.
- Investment Banking.
- Credit Unions and Community Banks.
- Financial Technology (Fintech) Companies.
- Mortgage and Loan Providers.
- Governmental financial institutions and regulatory bodies.
- Insurance companies offering banking products.

Target Organizations Departments:

- Customer Service Department.
- Retail Banking Division.
- Corporate Banking Division.
- Marketing and Communications Department.
- Operations Department.
- Digital Strategy and Transformation Department.
- Human Resources and Training Department.
- Compliance and Risk Management Department.
- Product Development Department.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop a comprehensive CX strategy tailored to the banking sector.
- Map the end-to-end customer journey across all digital and physical touchpoints.
- Implement effective Customer Relationship Management (CRM) tactics to enhance engagement.
- Analyze customer feedback and data to derive actionable insights for service improvement.
- Design and manage a seamless omnichannel banking experience for customers.
- Handle difficult customer situations and complaints with professionalism and empathy.
- Utilize key performance indicators (KPIs) like NPS and CLV to measure CX success.
- Foster a customer-centric culture within their teams and the broader organization.
- Leverage technology and AI to personalize the banking experience at scale.
- Ensure customer interactions comply with financial regulations and data privacy standards.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, engaging, and practical, ensuring that participants can immediately apply their learning in a real-world banking context. We employ a blended learning approach that combines expert-led presentations with hands-on activities. The course heavily features case studies of leading global financial institutions that have successfully transformed their customer experience. Participants will work in groups on practical exercises, such as developing customer journey maps and creating service recovery protocols. Interactive workshops and brainstorming sessions encourage the sharing of ideas and experiences among peers from various banking backgrounds. Role-playing scenarios will be used to simulate challenging customer interactions, allowing participants to practice and refine their communication and problem-solving skills in a supportive environment. Continuous feedback is provided by the instructor to facilitate growth and mastery of the concepts. The program emphasizes strategic thinking and practical application, equipping attendees with not just the "what" and "why" of superior banking CX, but also the "how".

Course Agenda (Course Units):

Unit One: Foundations of Customer Experience in the Banking Sector

- The Evolution of Customer Expectations in Financial Services.
- Defining Customer Experience (CX) vs. Customer Service.
- The Business Case for CX: Linking Experience to Profitability and Loyalty.
- Understanding the Modern Banking Customer's Psychology and Needs.
- Key Principles of Customer-Centricity in a Regulated Environment.
- Introduction to Service Quality Models like SERVQUAL.
- Identifying Critical Moments of Truth in Banking Interactions.

Unit Two: Mapping and Designing the Omnichannel Customer Journey

- Fundamentals of Customer Journey Mapping.
- Identifying and Analyzing Key Customer Touchpoints (Digital and Physical).
- Creating Detailed Customer Personas for Different Banking Segments.
- Designing a Seamless and Consistent Omnichannel Experience.
- Integrating Mobile, Online, Branch, and ATM Channels.
- Optimizing the Digital Onboarding Process for New Customers.
- Workshop: Building a Customer Journey Map for a Core Banking Product.

Unit Three: Mastering Customer Relationship Management and Personalization

- Core Principles of Customer Relationship Management (CRM).
- Strategies for Building Trust and Long-Term Client Relationships.
- Effective Communication Techniques for Banking Professionals.
- From Mass Marketing to Hyper-Personalization.
- Leveraging CRM Systems and Data to Anticipate Customer Needs.
- Proactive vs. Reactive Customer Engagement Strategies.
- Role-Playing: Relationship-Building Conversations.

Unit Four: Leveraging Data and Technology for Enhanced Banking CX

- The Role of Data Analytics in Understanding Customer Behavior.
- Introduction to AI, Machine Learning, and Chatbots in Customer Service.
- Using Customer Feedback (Surveys, Reviews) for Continuous Improvement.
- Key CX Metrics: Net Promoter Score (NPS), Customer Effort Score (CES), and CLV.
- Ensuring Data Privacy and Security in a Digital Banking World.
- Digital Tools for Enhancing the In-Branch Experience.
- Case Study: Successful Digital Transformation in a Global Bank.

Unit Five: Cultivating a Customer-Centric Culture and Measuring Success

- The Role of Leadership in Driving a Customer-First Mindset.
- Empowering Frontline Employees to Resolve Customer Issues.
- Developing Effective Service Recovery and Complaint Management Protocols.
- Training and Coaching Teams for CX Excellence.
- Creating a Framework for Measuring the ROI of CX Initiatives.
- Aligning Employee Experience (EX) with Customer Experience (CX).
- Developing a Personal Action Plan for Implementing Course Learnings.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As AI and automation increasingly handle routine banking interactions, what is the evolving role of the human employee in building genuine emotional connections and trust with customers?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by offering a holistic and highly specialized curriculum tailored specifically to the unique challenges and regulatory complexities of the modern banking industry. Unlike generic customer service programs, every module, case study, and activity is framed within a financial services context, addressing real-world scenarios that relationship managers, branch staff, and CX leaders face daily. The program masterfully blends timeless principles of relationship management with cutting-edge strategies for digital and omnichannel customer engagement. It moves beyond theory to provide a practical, actionable toolkit, focusing on how to implement change and measure its impact through industry-specific metrics like customer lifetime value and Net Promoter Score. Furthermore, the course places significant emphasis on cultivating a customer-centric culture, recognizing that sustainable CX transformation is driven by people and leadership, not just technology. Participants will leave not only with new skills but with a strategic mindset to champion customer-centric initiatives and drive tangible business results within their organizations, making it an invaluable investment for any forward-thinking banking professional.