Strategic Customer Experience in Retail Banking Training Course

30 Nov - 04 Dec 2026

Kuala Lumpur

5200 € (Per Person)

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Course Introduction / Overview:

In today's hyper-competitive financial landscape, retail banks can no longer compete on products or pricing alone. The new battleground is customer experience (CX), a critical differentiator that drives loyalty, retention, and profitability. This intensive training course is designed to equip banking professionals with the strategic frameworks and practical skills needed to design, implement, and manage a world-class customer experience. Moving beyond transactional service, we delve into creating memorable and emotionally resonant interactions across all touchpoints. As detailed in the seminal work "The Experience Economy" by B. Joseph Pine II and James H. Gilmore, customers now seek valuable experiences, and the banking sector is no exception. This program, offered by BIG BEN Training Center, provides a comprehensive roadmap for transforming your organization's culture, processes, and technology to be truly customer-centric. Participants will learn to map the end-to-end customer journey, leverage data for deep personalization, and integrate digital and physical channels into a seamless omnichannel strategy, ultimately turning satisfied customers into loyal advocates for the brand.

Target Audience / This training course is suitable for:

- Retail Banking Managers and Directors.
- Customer Experience (CX) and Customer Service Managers.
- Branch Managers and Regional Heads.
- Digital Banking and Innovation Leaders.
- Product Development and Management Professionals.
- Marketing, Brand, and Communications Managers.
- Operations and Process Improvement Specialists.
- Relationship Managers and Private Bankers.
- Strategy and Transformation Team Members.

Target Sectors and Industries:

- Commercial and Retail Banking.
- Credit Unions and Community Banks.
- Financial Technology (FinTech) Companies.
- Wealth Management and Investment Firms.
- Insurance and Financial Services Providers.
- Government Financial Institutions and Regulatory Bodies.

- Mortgage and Lending Companies.

Target Organizations Departments:

- Retail Banking Division.
- Customer Experience and Service Quality Departments.
- Digital Strategy and E-Banking Departments.
- Marketing and Corporate Communications.
- Branch Operations and Network Management.
- Product and Service Development.
- Strategy and Corporate Planning.
- Human Resources and Training Departments.
- Compliance and Risk Management.

Course Offerings:

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

- Develop a comprehensive customer journey map for key retail banking services.
- Implement effective Voice of the Customer (VoC) programs to capture actionable insights.
- Leverage data analytics to drive personalized customer interactions and product offerings.
- Design and manage a seamless omnichannel experience that integrates physical and digital touchpoints.
- Master service recovery techniques to turn negative experiences into opportunities for loyalty.
- Calculate the Return on Investment (ROI) of customer experience initiatives.
- Foster a customer-centric culture throughout the organization.
- Utilize key CX metrics like Net Promoter Score (NPS) and Customer Effort Score (CES) to measure success.

Course Methodology:

This training course employs a dynamic and interactive learning methodology designed for maximum engagement and practical application. The program, facilitated by experts from BIG BEN Training Center, moves beyond traditional lectures to create an immersive educational environment. Participants will engage with real-world case studies from leading global financial institutions, analyzing both their successes and failures in customer experience management. A significant portion of the training is dedicated to hands-on workshops, where attendees will work in teams to create customer personas, map complex banking journeys, and design innovative service solutions. Interactive group discussions, brainstorming sessions, and role-playing scenarios for handling difficult customer situations will be used extensively to reinforce learning and build practical skills. The methodology emphasizes collaborative learning, allowing participants to share experiences and best practices from their own organizations. Continuous feedback from the facilitator ensures that learning is targeted, relevant, and directly applicable to the challenges faced in the modern retail banking sector.

Course Agenda (Course Units):

Unit One: Foundations of CX in Modern Retail Banking

- The strategic importance of customer experience in the financial industry.
- Understanding the evolution from customer service to customer experience management.
- Key metrics for measuring banking CX: NPS, CSAT, and CES.
- The psychology of the banking customer: trust, emotion, and decision-making.
- Building a customer-centric culture from the top down.
- Analyzing the competitive landscape and CX benchmarks in banking.
- The financial impact and ROI of superior customer experience.

Unit Two: Mapping and Understanding the Customer Journey

- Introduction to customer journey mapping principles and techniques.
- Identifying and analyzing critical touchpoints in the banking lifecycle.
- Developing detailed customer personas for different banking segments.
- Conducting empathy mapping to understand customer needs and pain points.
- Identifying moments of truth that define the customer relationship.
- Analyzing friction points in processes like account opening and loan applications.
- Using journey maps to drive process improvement and innovation.

Unit Three: Designing the Omnichannel Banking Experience

- Integrating the physical branch with digital and mobile channels.
- Best practices in user experience (UX) for mobile banking apps.
- The role of the modern bank branch: from transaction hub to advisory center.
- Strategies for delivering consistent service across all channels.
- Leveraging technology for seamless customer onboarding.
- Personalization strategies in digital banking.
- The future of self-service technology and ATMs.

Unit Four: Leveraging Data, Technology, and Feedback

- Implementing an effective Voice of the Customer (VoC) program.
- Using data analytics and CRM systems to gain a 360-degree customer view.
- The role of Artificial Intelligence (AI) and chatbots in customer service.
- Proactive communication and expectation management strategies.
- Frameworks for effective complaint handling and service recovery.
- Turning customer feedback into actionable business intelligence.
- Ensuring data privacy and security while personalizing the experience.

Unit Five: Leading a Customer-Centric Transformation

- Developing and communicating a clear CX vision and strategy.
- Aligning employee experience (EX) with customer experience (CX).
- Training and empowering front-line staff to be CX champions.

- Leading change management for a customer-centric transformation.
- Future trends in retail banking: FinTech, open banking, and hyper-personalization.
- Creating a continuous improvement cycle for CX initiatives.
- Developing a personal action plan to implement key 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:

How can traditional retail banks maintain a human-centric approach and build emotional connections in an era increasingly dominated by AI-driven interactions and digital-first service models?

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

This course distinguishes itself by moving beyond operational service tactics to focus on the strategic leadership required to embed a customer-centric philosophy within a financial institution. While other programs may concentrate on specific tools or channels, this training provides a holistic framework for orchestrating a seamless, omnichannel customer journey that drives measurable business results. We place a strong emphasis on the linkage between employee engagement and customer loyalty, a critical connection often overlooked. The curriculum is built upon a foundation of rigorous academic principles combined with practical, real-world case studies specifically from the global banking and FinTech sectors, ensuring relevance and applicability. Rather than just teaching how to measure metrics like NPS, we explore the deeper strategies required to systemically improve them. The course is designed not just to train, but to transform mindsets, empowering leaders to champion change, justify CX investments through clear ROI analysis, and build a sustainable competitive advantage based on unparalleled customer experience in a rapidly evolving industry.