



DURATION

65 - 85 hours



DELIVERY CHANNEL

eLearning
+ Textbook



Modules:

- 1 Retail Banking Overview
- 2 Business Ethics and Compliance
- 3 People Management
- 4 Performance Management
- 5 Products
- 6 Operations
- 7 Customer Service Quality
- 8 Marketing
- 9 Effective Sales Management
- 10 Relationship Management
- 11 Financial Management

eLearning

Certified Branch Manager

CUSTOMER-CENTRIC BRANCH MANAGEMENT IN SUPPORT OF RETAIL BANK TRANSFORMATION

CERTIFICATION OVERVIEW & BENEFITS

The digital transformation in retail banking has fundamentally changed the role of the bank branch. Customer expectations and the customer engagement landscape have changed, however the need for relationship management and financial advice remains.

Certified Branch Manager (CBM) teaches the essential business acumen and best practice-led competencies in customer-centric service delivery that creates customer value, drives revenue and process efficiencies and serves customer needs through the branch network.

Candidates are equipped with the tools to optimize the bank's service culture and drive process improvements, implement management information systems with key performance indicators to maximize branch productivity, and grow and retain front line staff for a competitive and sustainable advantage.

LEARNING OBJECTIVE

Gain the essential business acumen and best practice-led competencies in customer-centric branch management that drives revenue and process efficiencies and creates customer value.

COMPETENCIES GAINED

Candidates are able to:

- Examine and identify the key roles of branch employees and their associated ethical and professional stance in relation to creating positive customer experience.
- Identify the key attributes of bank products and services and their respective roles in meeting customers' needs across life-cycle stages.
- Understand the role of data, processes and systems in creating omni-channel customers as well as the fundamental principles of effective queue management in bank branches and call centers.
- Drive customer-centric employee behaviors to improve branch productivity and customer outcomes.
- Appraise the effectiveness of branch salespeople, using a Balanced Sales Performance Scorecard and related key performance indicators (KPIs).
- Examine the role of the five key dimensions of customer service quality and their link to customer loyalty and customer success.
- Measure customer service quality through the application of measures such as Net Promoter Score (NPS), Customer Effort Score (CES) and Customer Life-Time Value (CLV).
- Identify the unique approach for effective relationship marketing and sales of banking products and services as well as the key role of long-term relationship management underlined by CRM.
- Suggest specific sales strategies for digital services and initiatives to overcome resistance to onboarding.
- Identify the sources of principal banking risks.
- Apply the CAMELS model and associated ratios to bank financial statements to identify and interpret key information content.

INTENDED AUDIENCE

- Branch Managers
- Retail Bankers who have been identified as having management potential