

Banking BD: CRM Personalization & Omnichannel

Learn to apply CRM personalisation, omnichannel strategies and digital tools to drive banking business development.

40 Hours

DURATION

6

MODULES

19

TOPICS

COURSE OVERVIEW

In today's rapidly evolving financial landscape, business development in banking is no longer driven by just relationships and traditional sales practices—it is powered by data, customer intelligence, and advanced technology. This intensive course equips banking professionals with the strategic understanding, digital tools, and innovation mindset required to accelerate growth in a tech-driven economy.

WHO THIS COURSE IS FOR

This program is designed for professionals in the banking sector who are responsible for driving growth, managing customer relationships, implementing technology initiatives, or designing digital strategies

LEARNING OBJECTIVES

- Explain the evolution of business development in banking
- Describe the role of technology in customer engagement
- Map digital customer journeys to identify pain points
- Apply data-driven personalisation tactics within CRM systems
- Compare tools for upselling and cross-selling
- Integrate branch, online, mobile and call centre channels
- Evaluate social media tools for prospecting and targeting
- Plan upskilling of a tech-enabled sales workforce

TRAINING APPROACH

“Participant Involvement: We will introduce regular opportunities for participant involvement, including discussions, feedback sessions, and reflection exercises, to ensure that the training remains interactive and relevant to their needs.”

6 Modules, 19 Topics

01

Introduction to Business Development in the Digital Era

TOPICS

- Evolution of Business Development in Banking
- Role of Technology in Modern Customer Engagement
- Key Metrics and Goals in Tech-Enabled Business Development

02

Digital Customer Journey Mapping

TOPICS

- Understanding Customer Expectations in a Digital World
- Mapping Pain Points and Opportunities
- Tools for Customer Journey Mapping

03

CRM Systems & Customer Personalization

TOPICS

Role of CRM in Business Growth · Data-Driven Personalization Tactics · Tools for Upselling and Cross-selling

04

Omnichannel Banking Strategies

TOPICS

- Integrating Branch, Online, Mobile, and Call Centre Channels
- Chatbots and Virtual Assistants
- Delivering Consistent Experiences Across Channels

05

Social Media in Banking

TOPICS

- SEO, SEM, and Paid Campaigns for Banking Products
- Using Social Listening Tools for Prospecting
- Behavioural Analytics and Targeting
- Measuring Campaign Effectiveness

06

Building a Tech-Enabled Sales Culture

TOPICS

Upskilling the Business Development Workforce · Digital Mindset and Agile Sales Teams · Gamified Dashboards and Leaderboards

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

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