AI for Customer Experience and Personalization in Banking Training

Duration: **1 Day**

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Artificial Intelligence enables banks to better understand their customers, anticipate their needs and deliver more personalized experiences. Approaches such as **Customer 360, Next Best Action, Next Best Offer and hyper-personalization** can transform customer data into more meaningful and actionable insights.

The **AI for Customer Experience and Personalization in Banking** training program helps participants understand how AI and Generative AI can be applied throughout the customer journey and how customer-centric AI use cases can be designed.

Who Should Attend

Marketing, CRM, Digital Banking, Product, Customer Experience and Sales Teams

What You Will Learn

By the end of the training, participants will be able to:

- Explain the role of AI in customer experience and personalization.
- Understand Customer 360, Next Best Action and Next Best Offer approaches.
- Evaluate applications of segmentation, churn prediction and sentiment analysis.
- Understand the potential of Generative AI and AI Agents in customer service.
- Develop personalized customer communication scenarios using AI.
- Assess risks related to privacy, bias, manipulation and customer trust.

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Training Outline

Module 1 — AI and the Next Generation of Customer Experience

- The role of AI in banking customer experience
- Customer 360 and a holistic view of the customer
- Next Best Action
- Next Best Offer and personalized propositions
- Hyper-personalization
- Delivering the right experience at the right time

Module 2 — AI-Powered Customer Analytics

- AI-assisted customer segmentation
- Churn prediction and identifying customers at risk
- Sentiment analysis of customer feedback
- Customer behavior and interaction analysis
- Identifying customer needs and behavioral trends
- Turning analytical insights into customer actions

Module 3 — Generative AI and Intelligent Customer Service

- Generative AI-powered customer service
- AI customer assistants and next-generation chatbots
- Agentic Customer Service and AI Agents
- Analyzing and routing customer requests
- Personalized customer communications
- Human agent + AI collaboration

Module 4 — Risks of AI-Powered Personalization

- The boundary between personalization and manipulation
- Bias and the risk of unfair customer treatment
- Customer data privacy
- Transparency in AI-assisted decisions
- Maintaining customer trust
- Human oversight in critical customer processes

Workshop — “Redesign the Banking Customer Journey with AI”

Participants analyze a sample **banking customer journey** and identify where AI can create value across different customer touchpoints.

From customer acquisition and product usage to customer service, loyalty and retention, participants explore opportunities involving **personalization, predictive analytics, Generative AI and AI Agents**.

By the end of the workshop, teams design an AI-enabled customer journey aimed at improving customer experience and business outcomes while maintaining **privacy and customer trust**.

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