# AI for Customer Experience and Personalization in Banking Training

Duration: **1 Day**

BİLGİNÇ IT Academy
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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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