

Customer
Institute

Customer Centricity in the Financial Sector

Fundamentals
of Customer
Experience
Management

Customer
Institute
Certified Training Program

This course
qualifies you to
become a Certified
Customer Centricity
Expert (CCCX)

1. Target Group

The *Customer Centricity in the Financial Sector* training course is a high-caliber management education event with one of the industry's top thought leaders. The event is ideal for

- **Customer Experience leaders or team members** who need to learn or expand the skills required for their jobs.
- **Heads of Marketing or Customer Service** who want to initiate or improve the CX program driven by their function

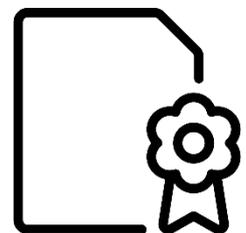


2. Concept & Certification

Expert knowledge with implementation guarantee – now you can finally learn the basics of Customer Experience and implement them right on schedule for your own company!

The CX Masterclass with Stefan Osthaus is aimed at those who want to further develop their knowledge about best practice disciplines, tools, techniques, and methods in the field of customer experience that are used around the globe. All participants of the CX Masterclass can create their own personal development plan and apply the acquired knowledge immediately in their organization!

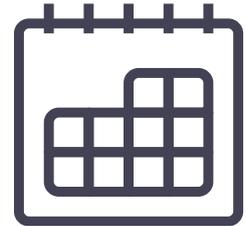
This course is certified by the Customer Institute and qualifies participants to become a Certified Customer Centricity Expert (CCCE) upon passing of the final examination at the end of the course. Certification fees are included in the training fee.



3. Duration

Customer Centricity in the Financial Sector is a two-day event, held in person and on-site.

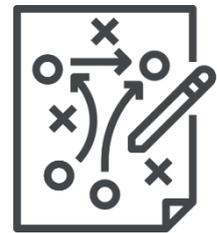
After the seminar, you can optionally secure ongoing *sherpa* support from the Customer Institute leadership team. This guidance is a lighter collaboration format than a consultancy engagement while still giving you access to ongoing advice and guidance regarding your customer centricity program.



4. Training Foundation

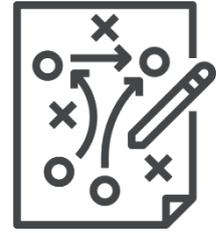
During the Customer Experience Masterclass with Stefan Osthaus, we will cover all main aspects of introducing a Customer Experience program in a medium to large organization.

The training program follows the structure of the Customer Institute “Customer Centricity Engine” (see below), which represents the 12 chapters of this training program.



5. Agenda

Customer Centricity in the Financial Sector will cover all main aspects of segmenting customers, listening to their needs and feedback, as well as introducing a customer-centric continuous improvement program in the financial sector.



DAY 1

◇ Pulse Check: How trends in CX affect the Financial Sector

- Global trends in the financial sector
- Omani finance and economy trends affecting the financial sector
- Resulting challenges for customer centricity

◇ Step 01: Set the CX Vision and Strategy

- What is Customer Experience - and why now?
- CX as a business strategy: From buzzword to boardroom
- Expectations, perception, and the drivers of satisfaction

◇ Step 02: Start a CX Team

- What kind of team do you need at your current maturity level?
- Organizational ownership, sponsorship, and first roles
- Building cross-functional CX coalitions

◇ Step 03: Assess the Current Performance

- CX maturity models and diagnostic tools
- Identifying quick wins and structural gaps

◇ Step 04: Map & Design the Customer Journey

- From aspiration to articulation: Defining your customer promise
- Journey Mapping done right: scope, depth, methods
- Aligning internal reality with customer perception

◇ Step 05: Listen, Analyze, Report, React

- Introduction to VoC, VoE, and VoP
- The method of CX/EX Exploration
- Avoiding over-surveying through smarter listening

Summary and Reflections on Day 1

DAY 2

- ◇ **Step 06: Build a SMART Action Plan**
 - From insights to prioritization
 - Activity prioritization, planning, and execution
- ◇ **Step 07: Combine CX and EX**
 - Two sides of the same coin
 - How employee experience drives customer outcomes
 - The 4 Ps of EX
 - Introduction to the Great People Index™
- ◇ **Step 08: Enable and Recruit Staff**
 - Hiring for empathy, onboarding for experience
 - Enabling frontline ownership of the promise
 - Culture shift through empowerment
- ◇ **Step 09: Motivate and Reward the Right Actions**
 - Experience-linked KPIs
 - Recognition programs that work
 - Aligning incentives with behaviors
- ◇ **Step 10: Continuously Improve**
 - Closing the loop between promise and delivery
 - Designing internal journeys to support external ones
 - Monitoring consistency and escalation paths
- ◇ **Step 11: Measure and Manage Impact**
 - Proving the ROI of CX and EX
 - Metrics that matter: linking to financials
 - Building your business case
- ◇ **Step 12: Agentic Experience Management**
 - How to sustain momentum and avoid backsliding
 - Designing a roadmap for growth
 - Engaging executives and scaling CX
 - **Discussion:** Your take-aways and their impact on your CX strategy for the next 6–12 months
- ◇ **Final Wrap-Up and Certification Exam**
 - Other CX/EX topics per participants' request

- **Throughout the 2 days:**
Numerous case studies and group activities

Material: CX Masterclass digital workbook – included in the participation fee

6. Seminar Elements

Beyond the agenda, *Customer Centricity in the Financial Sector* offers a wealth of opportunities to scale-up the knowledge of team members, acquaint leaders with the principles of customer centricity, network with peers from different institutions, work on real-life cases, and discuss your organization's individual challenges.

FUNDAMENTALS AND METHODS

Discuss with colleagues and industry contacts on an equal footing after you have learned all the important basics and methods of customer experience in this seminar. Whether you're starting out as a new leader or refreshing and completing as a more experienced team member or executive of the CX team, the seminar teaches the methods and approaches that have proven to be best practices around the globe.



FACTS AND FIGURES

From gathering customer-relevant feedback to deriving insights and creating pragmatic action plans, *Customer Centricity in the Financial Sector* focuses entirely on the mantra of Customer Experience “Data – Insight – Action”. You will learn how to quickly and efficiently turn your CX program into a continuous improvement program within your company. In addition, we teach you all the basics about the return on investment of CX programs, so that you too can convincingly answer critical questions about the benefits of such programs.



CASE STUDIES AND INDUSTRY BEST PRACTICES

Exposing you to real-life challenges, typical pitfalls, and ways to avoid them, as well as winning models from CX leading organizations from around the globe, our masterclass is hands-on and focused on pragmatic execution. You will be solving the most common challenges and come home with proven approaches to make a CX program sustainable and successful.



NETWORKING AND SOLVING YOUR OWN CHALLENGES

In our seminar you will meet like-minded experts from various institutions. Take advantage of the opportunity to expand your network and get to know contact people for future exchanges of ideas. The seminar will provide enough time to discuss your individual challenges with your CX program and develop effective solutions.



7. Customer Institute Certified

The Customer Institute is an independent not for profit organization. Experts, practitioners, authors, and educators from the field of customer centricity make up the institute's board of directors as well as the much larger group of contributors to their research and tool development.

This training program is certified by the Customer Institute as meeting or exceeding industry best practices in management education. Participants will receive a participation certificate reflecting this Customer Institute certification. Upon passing the final examination at the end of the course, participants can optionally (at no additional cost) earn certification as Certified Customer Centricity Expert (CCCX).

The CCCX certification is valid for three years and turns into a lifetime certification if renewed once within these three years.



8. Your Facilitator

Stefan Osthaus is one of the industry's top thought leaders and consultants. He has been a leader in Fortune 500 companies for more than 15 years and has held global responsibility for the customer experience of 120 million customers as well as the employee experience of tens of thousands of employees.

Stefan now helps leading organizations around the globe to combine their Customer and Employee Experience practices and treat them as two sides of the same coin. Stefan is the president of the Customer Institute, a global keynote speaker, and an insightful author.



9. About the Customer Institute

We are the go-to destination for everyone looking to excel through customer centricity. We develop, promote, and certify best practices. We help let the Global CX Community thrive in their professional development, personal growth, and brand impact. Our Board of Directors is made up of leading global CX thought leaders.

OUR BOARD OF DIRECTORS

