



# INDIAN INSTITUTE OF BANKING & FINANCE

(An ISO 21001:2018 Certified)

## TRAINING PROGRAMME

on

## CUSTOMER SERVICE EXCELLENCE

**In VIRTUAL (Online) MODE**

19<sup>th</sup> to 20<sup>th</sup> August 2025 (Tuesday & Wednesday)



Coordinated by:  
Indian Institute of Banking & Finance,  
Professional Development Centre, South Zone,  
94, Jawaharlal Nehru Road  
Vadapalani, Chennai - 600 026

Website: [www.iibf.org.in](http://www.iibf.org.in)

**For Details & Nomination, please contact:**

**Individuals can also register for the program at their own cost**

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## **BACKGROUND**

During its 97 years of service, IIBF has emerged as a premier institute in the banking industry. Considering the emerging requirements of the bankers in the dynamic environment, IIBF has been offering certification courses and training programmes to the banking professionals.

The training programs are designed in consultation with the industry experts and human resources personnel with an endeavour to address the skill gaps on a continuous basis. The regular offerings in varied areas prepare the banking professionals ahead of the impending change.

IIBF offers virtual training programmes for its Blended Certification courses and many other programmes to facilitate learning across the country.

IIBF also has state-of-the-art training facilities at its Leadership Centre at Mumbai. The four Professional Development Centres (PDCs) at Chennai, Delhi, Kolkata & Mumbai cater to the increasing demand for the focused training programmes.

## **PURPOSE**

The Programme on **“Customer Service Excellence”** has been designed considering the bankers’ needs in this area. Acquiring new customers and customer care are essential part of commercial banking. Best customer service leading to customer delight & moving towards Customer Excellence, is the key to success in business expansion in the current environment. Recommendations of B P Kanungo Committee Report on the Review of Customer Service Standards in the RBI Regulated Entities and EASE 7.0 – Maintaining a Strong Customer Orientation prompted the architecture of this programme. The art of bringing in new customers, involves the art of brand building; best customer service decides the edge over the other players in this competitive era. Considering the paradigm shift in the approach to new business and customer service, a two days programme on the subject is designed by the Institute targeting the officials working in the branches including the front line staff in commercial banks, co-operative Banks, NBFC’s, RRBs and SFBs. The programme envisages sharpening the skills for better leads conversion and customer care. It covers different key areas like communication skills, business etiquettes, selling of different Banking products, governing regulatory guidelines, etc. This is a trainee oriented programme with more emphasis on presentations, Experiential Learning, Group interactions, case studies and sharing of experiences facilitated by experienced faculty Members from the Banking Industry.

## **OBJECTIVES**

- To understand the relevance of Customer Service Excellence
- To improve the knowledge and skills in bringing in new customers with emphasis on relevant topics like segmentation, positioning, business etiquettes, moments of truth, push and pull style.
- To understand the regulatory guide lines and features in specific sectors in Credit like retail banking / SME financing products and Third party products
- To understand the need to focus Customer Centric Model
- To improve the skills required in the day-to-day of Banking with special emphasis on the Customer Service Excellence

## **CONTENT OVERVIEW**

- Changing Banking Scenario – Managing the Change and accepting the challenges in Customer Relations & Service Excellence
- Understanding the significance of customer relations
- Exploring the impact of positive and negative customer experiences
- Introduction to the customer journey and touchpoints
- Effective communication skills for customer interactions using Transactional Analysis Techniques (TA)
- Interpersonal Skills to connect with your customers using TA
- Conflict Resolution Skills and enhancing responsiveness using TA
- Building trust and credibility with customers using TA
- Understanding the Role of Emotional Intelligence (EI) in Customer Service – Listening to Customers
- Handling customer complaints and turning them into opportunities
- Techniques for understanding and identifying customer needs
- Service Quality – SERVQUAL Model (Identifying the 5 Gaps in Customer Service) – Moment of Truth.
- BaaS – Banking as a Service Model
- Customizing products/services to meet customer expectations
- Leveraging technology for improved customer experiences

- Dealing with difficult customers and challenging situations
- Creating loyalty programs and incentives
- Social media and its role in customer engagement
- Banking Ombudsman and Internal Ombudsman for Resolution of Complaints
- EASE 7.0 – From Customer Care to Customer Delight

### **METHODOLOGY**

Lectures, Case Studies, Discussions & interactions and sharing of experience on Virtual Platform (ZOOM)

### **TARGET GROUP**

**Officers from Scale-1 & up to Scale IV or equivalent in Banks/ FIs currently posted or proposed to be posted in Branches, Branch Managers & Trainers can also attend this programme.**

### **DURATION**

**2 Days 19<sup>th</sup> and 20<sup>th</sup> August'2025 (Tuesday & Wednesday)  
09.45 A.M. to 5.30 P.M.**

### **TRAINING FEE:**

**Rs. 5000/- per participant plus GST @18% i.e. Rs.900/- aggregating to Rs.5,900/- (In case of TDS deduction, please send us TDS certificate)**

Programme fees may be remitted to the credit of Institute's account as given below:

- ✓ Name of the Bank branch: State Bank of India, Vidya Vihar(West), Mumbai.
- ✓ Account no: **37067835882** IFSC code: **SBIN0011710**
- ✓ PAN No: AAATT3309D and GSTIN No. 33AAATT3309D2ZY

**(Kindly provide your GST Number in the nomination letter to facilitate raising of invoice)**



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### **Nomination Form (for Banks/FIs & Other Organisations)**

#### **Programme title: Customer Service Excellence**

**Date: 19<sup>th</sup> to 20<sup>th</sup> August 2025 (Tuesday & Wednesday)**

**Programme Type: Virtual Mode**

#### **Participants Nominated:**

Sl. No	Name (Mr./Ms./Mrs.)	Designation	Branch /Office	Mobile No. and Land Line No.	E-mail
1					
2					
3					
4					

Name of the Bank/FI	:
Address	:
GST No	:
PAN No	:
Phone/Mobile Number of Nominating Official :	
E-Mail ID of Nominating Official	:

#### **Fee**

Rs. 5000/- per participant plus GST @18% i.e. Rs.900/- aggregating to Rs.5,900/-

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Please send your nominations at the earliest to:



**INDIAN INSTITUTE OF BANKING & FINANCE**  
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**Nomination Form (for Self-Sponsored Candidates)**

**Programme title: Customer Service Excellence**

**Date: 19<sup>th</sup> to 20<sup>th</sup> August 2025 (Tuesday & Wednesday)**

**Programme Type: Virtual Mode**

**Details of the candidate:**

Sl. No	Name (Mr./Ms./Mrs.)	Designation	Branch /Office	Mobile No. and Land Line No.	E-mail
1					

**Fee**

Rs. 5000/- per participant plus GST @18% i.e. Rs.900/- aggregating to Rs.5,900/-  
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