



RETAIL BANKING INSTITUTE
Professional education and training for bankers worldwide

THE CXE SUMMARY

A focused programme to deliver measurable CX execution wins

- ✓ 2 Days
- ✓ Facilitated working session
- ✓ 14-Day Execution Win
- ✓ 90-Day CX Execution Plan

REGISTRATION OPTIONS

- ✓ One candidate €249
- ✓ Two candidates €469
- ✓ Three candidates €659
- ✓ Four or more candidates: €200 each.

WHY THIS PROGRAMME EXISTS

WHO IS THIS PROGRAMME FOR?

HOW THE PROGRAMME WORKS

THE AGENDA

WHAT PARTICIPANTS TAKE BACK

HOW SUCCESS IS JUDGED

CUSTOMER EXPERIENCE EXECUTION (CXE) SHORT PROGRAMME

DESIGNED FOR INSIGHT,
BUILT FOR EXECUTION

This programme puts into practice the execution discipline introduced in the CXE Executive Webinar “From CX Insight to Daily Execution Control”. It is a practical, time-bound programme for banks that want evidence before scaling.

WHY THIS PROGRAMME EXISTS

Most banks already have customer experience strategies, metrics and surveys, and training and investment. Yet leaders still see:

- repeat customer visits and calls;
- queues that reappear;
- issues routed, not owned;
- limited visibility of where execution breaks down.

The unresolved question is not intent or strategy. It is “Do we actually have execution control – or just insight?” This CXE Short Programme exists to test execution discipline safely, visibly, and quickly before further scale or investment.





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WHO IS THIS CXE SHORT PROGRAMME FOR?

We recommend that each participating bank nominates two or more participants, typically drawn from frontline branch or contact-centre leaders; CX, service quality, or customer operations teams; operational managers who influence daily frontline behaviour; or implementation-oriented leaders trusted to test discipline, not debate strategy.

Participants should see customer friction daily. They should have authority to change behaviour locally and they should be willing to test, observe, and learn.



HOW THE PROGRAMME WORKS (AT A GLANCE)

The programme is delivered over facilitated working days, split into two-two-hour sessions per day.

FOCUS



One repeat-failure customer issue relevant to your bank

APPROACH



Behaviour-first; execution before design

SYSTEMS



Uses existing CRM systems or alternatives

OUTCOME



Evidence of execution control before scale



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DAY 1: SESSION 1: DIAGNOSING THE EXECUTION BREAKDOWN

The purpose of this opening session is to make execution failure visible before attempting fixes.

Participants will:

- identify where customer work gets stuck or re-enters;
- distinguish symptoms from root causes;
- diagnose breakdowns across demand vs exception handling, end-to-end ownership, follow-up discipline and operational visibility

Here we use a CXE Diagnostic Model. This is a structured, practical diagnostic used on real cases.

DAY 1: SESSION 2: SELECTING A 14-DAY EXECUTION WIN

This session tests whether execution control can be demonstrated quickly.

Participants will:

- identify everyday customer 'niggles' that cause repeat visits or calls;
- apply a Friction vs Control filter to select one issue only;
- define a 14-Day Execution Win with one owner, one team, and one visible behaviour change.

Here we use a 14-Day Execution Win Filter. It is not a prioritisation matrix but a discipline filter for frontline-led execution.

DAY 2: SESSION 1: MAKING EXECUTION VISIBLE

This session will give leaders visibility without new systems.

Participants will:

- translate execution discipline into simple routines;
- use CRM or CRM-lite tools to track interaction capture, ownership, and follow up and closure
- distinguish data quality as a service issue, not an IT issue.

Here we use CRM (or alternative methods if CRM is not used); Simple execution visibility dashboards; and Daily and weekly execution rhythms.

DAY 2: SESSION 2: BUILDING THE 90-DAY CX EXECUTION PLAN

In this final session, we move from proof to sustained execution.

Participants will:

- define one priority journey or failure point;
- agree named ownership and weekly review cadence;
- build a realistic 90-Day CX Execution Plan focused on removing repeat failures, embedding habits and sustaining visibility.

Here we use a 90-Day CX Execution Planning Framework.



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WHAT PARTICIPANTS TAKE BACK TO THE BANK

Participants leave with:

- One 14-Day Execution Win, a small, visible fix that customers and staff notice immediately.
- One 90-Day CX Execution Plan: this is focused on one journey; one owner; weekly leadership visibility.
- Execution-ready tools, such as diagnostic model, execution filters, and CRM-lite routines.
- Evidence not promises: Observable behaviour change and execution relief before scale.

HOW SUCCESS IS JUDGED (FIRST 90 DAYS)

Success is not measured by scorecards, targets or bank-wide extrapolation.

Leaders instead ask:

- Where is customer work getting stuck?
- What repeat failure has been removed?
- Who owns closure this week?
- What evidence do we see on the ground?

If execution control cannot be demonstrated in 90 days, scaling would be premature.

GET READY!

Customer experience improves only when execution becomes visible and controlled.

The CXE Short Programme offers a low-risk way to test that control: before scaling further.

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