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COURSE BROCHURE

Bank Operational Excellence and Process Improvement Training Course

26 – 30 July 2027
New York

Bank Operational Excellence and Process Improvement Training Course

Ref: 2710_103472 **Date:** 26 – 30 July 2027 **Location:** New York **Fees:** 7900 GBP

Bank Operational Excellence is a 1-week training course for operations managers and process owners in banks and insurers, built around one named work product: an end-to-end process improvement plan. Customers compare every account opening and claim with the fastest digital service they use, while rework raises unit cost. Jupiter Prime Training runs this Bank Operational Excellence course for cohorts from many institutions.

Why Bank Operational Excellence Matters Now

Three forces shape bank operations today. Customers expect a loan decision, a card replacement or a claim payment within hours, not days. Boards fund only change that lowers handling effort. Auditors ask how process owners know that service promises and controls hold. Handled well, this releases capacity and catches errors before customers do; handled badly, backlogs hide behind overtime and the same corrections repeat each month.

Who Gains Most from Bank Operational Excellence

- Leaders accountable for branch service and queue times
- Owners of back-office journeys such as account opening, lending fulfilment and payments repair
- Insurance operations leads responsible for policy issuance and claims handling turnaround
- Service quality and process improvement specialists who run diagnostic studies
- Operational control staff who connect process design with error and loss reporting

The greatest gain comes when a front-office lead, a back-office owner and a control specialist from one journey attend together.

Bank Operational Excellence Capabilities

Participants learn to treat a banking journey as one flow of work and to change it with evidence.

- Map a branch or back-office journey from customer trigger to final posting — the process owner choosing where to intervene
- Calculate handling time, waiting time and first-time-right rates — the operations head setting improvement targets
- Design service level promises with matching internal hand-off times — customers, relationship managers and supervisors
- Build a capacity model linking demand forecasts to staffing rosters — workforce and finance colleagues approving headcount
- Test root causes of rework with structured problem solving — control and audit partners reviewing recurring errors
- Communicate an improvement plan with benefits, owners and milestones — the executive sponsor releasing funds

Key Bank Operational Excellence Terms

- Value stream map — a picture of every step, wait and hand-off in a journey, showing where time is lost
- First-time-right rate — the share of cases completed without correction, return or repeat contact from the customer
- Failure demand — customer contact caused by an earlier failure, such as chasing a missing card
- Service level agreement — an internal or external promise of how quickly and accurately a defined request is completed
- Work in progress — cases started but not yet finished, a direct driver of turnaround
- Tiered daily huddle — a short standing meeting at team and unit levels to review performance and escalate problems

Bank Operational Excellence Day by Day

Day 1: Seeing the Bank as a Flow of Work

- Customer Journey Inventory — Choosing Which Banking Journeys Deserve Attention First
- Voice of the Customer Capture — Turning Complaints Into Measurable Service Needs
- Value Versus Waste Classification — Separating Customer Value From Internal Handling
- Failure Demand Sampling — Sizing Avoidable Contact in Branches and Contact Centres
- Operating Cost per Transaction — Linking Process Effort to Unit Economics

Day 2: Mapping Branch and Back-Office Journeys

- Current State Value Stream Map — Exposing Hand-Offs Between Branch and Operations Centre
- Swim Lane Diagram for Lending Fulfilment — Clarifying Ownership Across Credit and Documentation
- Time and Motion Observation — Measuring Real Handling Time at the Counter
- Rework Loop Tracing in Payments Repair — Locating Where Errors Re-Enter the Queue
- Claims Handling Walkthrough — Comparing an Insurer Journey With a Banking One

Day 3: Removing Waste and Rework

- Waste Categories in Financial Services — Naming Waiting, Duplication and Over-Processing
- Root Cause Analysis With Repeated Why Questioning — Testing Explanations for Recurring Errors
- Error Proofing of Forms and Data Capture — Preventing Missing Fields at Source
- Standard Work Instructions — Reducing Variation Between Branches and Teams
- Control Point Rationalisation — Keeping Checks That Prevent Loss and Removing Duplicates

Day 4: Service Levels, Capacity and Daily Control

- Service Level Design and Hand-Off Times — Matching Customer Promises to Internal Clocks
- Demand Forecasting by Hour and Day — Anticipating Peaks at Month End and Salary Days
- Capacity and Staffing Model — Deciding Rosters, Cross-Skilling and Overtime Limits
- Work in Progress Limits and Queue Rules — Shortening Turnaround Without Extra Headcount
- Visual Performance Boards and Tiered Huddles — Escalating Problems Before Customers Notice

Day 5: Practising the End-to-End Process Improvement Plan

- Future State Value Stream Map — Redesigning One Selected Journey From Trigger to Posting
- Benefit Sizing for Capacity Release — Quantifying Time, Rework and Cost Savings
- Risk and Control Impact Review — Confirming Redesigned Steps Keep Protection Intact
- Continuous Improvement Cadence — Embedding Reviews, Suggestion Routes and Owner Accountability
- End-to-End Process Improvement Plan — Presenting Owners, Milestones and Measures to a Sponsor

Applying Bank Operational Excellence After the Course

- Lead a two-week failure demand sample in one branch cluster or claims team
- Introduce a visual performance board and daily huddle for one back-office queue

Bank Operational Excellence Questions FAQ

What is Bank Operational Excellence and why does it matter now?

Bank Operational Excellence is the discipline of running banking and insurance journeys with less waiting, rework and cost. It matters now because customers expect fast service and boards demand lower unit cost.

Which roles gain most from Bank Operational Excellence training?

Operations managers and process owners gain most. That includes branch service leads, back-office owners in lending and payments, insurance claims leads and control staff.

How does Bank Operational Excellence differ from a general process improvement course?

Bank Operational Excellence works only on banking and insurance journeys. A general process improvement course uses factory or office examples; here every map and capacity model uses account opening, lending, payments repair and claims cases.

What do you bring back from Bank Operational Excellence training?

You bring back an end-to-end process improvement plan for one journey you own. It holds future state maps, sized benefits, a capacity model and revised service levels.

Bank Operational Excellence: The Way Forward

The end-to-end process improvement plan is the starting point. Its first use is deciding which redesigned steps go live first and which control changes need sign-off. Process owners, operations heads and control partners use it together. After the first cycle, revisit the capacity model against actual demand as customers move to digital channels.