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COURSE BROCHURE

# AI Next-Best-Offer and Churn-Risk Personalisation Course

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# AI Next-Best-Offer and Churn-Risk Personalisation Course

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AI Next-Best-Offer and Churn-Risk Personalisation is a 1-week training course for retail banking and telecom retention, CRM and customer value leads who build a retention offer decision blueprint. Subscribers and account holders now switch providers with a few taps, so the offer shown at the moment of risk decides whether revenue stays or leaves. Jupiter Prime Training delivers AI Next-Best-Offer and Churn-Risk Personalisation for leaders who own that moment.

## Why AI Next-Best-Offer and Churn-Risk Personalisation Matters Now

Three forces shape this field today. Contract-free plans and app-based accounts make switching cheap and fast, while acquisition costs keep rising. Event streams from usage and transactions let models flag risk within hours. Customers and supervisors also expect offer eligibility to be explainable and fair across segments. Organisations that act well keep profitable relationships at lower incentive cost; others discount customers who would have stayed. The course rests on ISO/IEC 42001 for AI management systems and the NIST AI Risk Management Framework NIST AI RMF.

## Who Gains Most from AI Next-Best-Offer and Churn-Risk Personalisation

- Leads accountable for subscriber or account retention targets and save-desk outcomes
- Owners of CRM decision engines and offer catalogues across digital and branch channels
- Heads of customer value analytics who commission propensity and uplift models
- Product leads for tariffs, bundles, cards and savings accounts who fund retention incentives
- Model risk and AI oversight leads who sign off scoring used in customer treatment

A cross-functional retention squad that sends its analytics, CRM and product leads together gains most.

## AI Next-Best-Offer and Churn-Risk Personalisation Capabilities

Participants move from scoring who might leave to deciding which treatment, if any, changes that outcome at an acceptable incentive cost.

- Specify churn-risk labels, observation windows and leading signals — for analytics sponsors
- Weigh propensity scores against uplift estimates when targeting saves — for retention budget holders
- Design next-best-offer arbitration rules balancing margin, risk and customer fit — for CRM owners
- Test offer eligibility for disparate impact across customer segments — for AI oversight leads
- Calculate incremental retained revenue with holdout groups — for finance partners

- Communicate model limits and contact-fatigue rules — for frontline and channel leaders

## Key AI Next-Best-Offer and Churn-Risk Personalisation Terms

- Next-best-offer — the single treatment a decision engine selects for a customer now, ranked by expected value, eligibility and contact rules.
- Churn-risk score — a model estimate of the probability that a subscriber or account holder leaves or goes dormant within a set window.
- Uplift modelling — a method that predicts how much an offer changes a customer's behaviour, separating persuadable customers from those who stay regardless.
- Persuadables — customers likely to stay only if they receive a treatment, the group where retention incentives earn their cost.
- Holdout group — a randomly withheld set of customers who receive no treatment, used to measure the true incremental effect of offers.
- Contact fatigue — the decline in response and trust when a customer receives too many offers across channels in a short period.

## AI Next-Best-Offer and Churn-Risk Personalisation Day by Day

### Day 1: Attrition Economics in Banking and Telecom

- Customer Lifetime Value Curves — Which Subscribers and Accounts Deserve Retention Spend
- Voluntary Versus Involuntary Churn Taxonomy — Where AI Treatment Can Help
- Leading Signal Inventory From Usage and Transactions — Early Warning Choices
- Switching Triggers in Contract-Free Markets — Timing of Save Interventions
- Retention Incentive Cost Baseline — Budget Envelope for Offer Personalisation

### Day 2: Churn-Risk Propensity Scoring

- Label Definition and Observation Windows — Avoiding Leakage in Churn Targets
- Gradient-Boosted Churn Classifiers — Accuracy Versus Explainability Trade-Off
- Calibration and Lift Charts — Setting Score Thresholds for Action
- Feature Attribution With SHAP Values — Explaining Risk Drivers to Channels
- Score Drift Monitoring — When to Retrain After Tariff or Product Changes

### Day 3: Uplift Modelling and Next-Best-Offer Decisioning

- Two-Model and Class-Transformation Uplift Methods — Finding Persuadable Customers
- Qini Curves — Comparing Uplift Models Before Rollout
- Offer Catalogue Design for Bundles, Cards and Tariffs — Treatment Choice
- Arbitration Rules on Expected Margin and Eligibility — Ranking Competing Offers
- Contextual Bandits for Offer Exploration — Learning While Protecting Revenue

## Day 4: Fairness, Oversight and Incremental Measurement

- ISO/IEC 42001 Controls for Decision Engines — Accountability for Offer Models
- NIST AI RMF Map and Measure Functions — Risk Register for Treatment
- Disparate Impact Testing on Offer Eligibility — Fair Access to Incentives
- Randomised Holdout Design — Proving Incremental Retained Revenue
- Contact Policy and Frequency Caps — Limiting Fatigue Across Channels

## Day 5: Practising the Retention Offer Decision Blueprint

- Telecom Prepaid Attrition Case — Applying Scores and Uplift Together
- Retail Current Account Dormancy Case — Choosing Treatments Under Budget Limits
- Arbitration Simulation Across Channels — Stress-Testing Offer Ranking Rules
- Oversight Sign-Off Rehearsal — Defending Fairness and Holdout Evidence
- Retention Offer Decision Blueprint — Completing Targeting, Offers and Measurement

## Applying AI Next-Best-Offer and Churn-Risk Personalisation After the Course

- Run an uplift comparison on one live save campaign using a randomised holdout and Qini curve
- Audit the offer arbitration rules of one channel for eligibility fairness and frequency caps

## AI Next-Best-Offer and Churn-Risk Personalisation Questions FAQ

### What is AI next-best-offer and churn-risk personalisation, and why does it matter now?

It is the use of churn scores and uplift models to choose the treatment that keeps a customer. It matters now because switching is cheap and fast, and untargeted discounts waste incentive budgets on customers who would stay anyway.

### Which roles gain most from AI next-best-offer and churn-risk personalisation?

Retention, CRM decisioning and customer value analytics leads gain most. Product owners funding incentives and AI oversight leads also benefit.

### How does AI next-best-offer and churn-risk personalisation differ from a general customer experience AI course?

It focuses on one decision rather than the whole journey. A general customer experience course covers chatbots and journey mapping; this one goes deep on uplift, offer arbitration and holdouts.

## What do you bring back from AI next-best-offer and churn-risk personalisation?

You bring back a retention offer decision blueprint. It sets out targets, offers, fairness checks and the holdout design.

## AI Next-Best-Offer and Churn-Risk Personalisation: The Way Forward

The retention offer decision blueprint first informs which save campaign moves from blanket discounts to uplift-based targeting. Retention leads, CRM owners and oversight reviewers use it to agree thresholds, offers and holdouts. After its first cycle, revisit the persuadable segment definitions and the contact caps.