Banking & Financial Services Communication Training Course

Professional Development Training Course Outline

Category	General Training	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Banking & Financial Services Communication Training Course is designed to build professional communication excellence, customer engagement mastery, and financial advisory communication skills within modern banking environments. In an era driven by digital banking transformation, fintech disruption, customer-centric banking, and AI-powered financial services, effective communication has become a core competency for success across retail banking, corporate banking, insurance, microfinance, and investment services.

This training equips professionals with advanced skills in client relationship management, regulatory communication compliance, digital customer experience (CX), and persuasive financial storytelling. Participants learn how to handle complex financial conversations, improve customer trust, reduce communication gaps, and enhance service delivery in a highly competitive global financial ecosystem, mobile banking landscape, and omnichannel banking environment.

Programme Curriculum

Banking & Financial Services Communication Training Course

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Course Duration

5 days

Course Objectives

1. Master customer-centric banking communication strategies
2. Develop high-impact financial advisory communication skills
3. Improve digital banking customer experience (CX)
4. Enhance cross-selling and upselling communication techniques
5. Strengthen KYC & AML compliance communication clarity
6. Build trust-based client relationship management skills
7. Improve conflict resolution in banking customer service
8. Apply emotional intelligence in financial communication
9. Enhance omnichannel communication
10. Develop professional negotiation skills in banking sales
11. Strengthen fraud awareness communication and risk messaging
12. Improve financial product explanation simplification skills
13. Master stakeholder communication in BFSI ecosystems

Target Audience

1. Bank Customer Service Representatives
2. Relationship Managers & Account Officers
3. Credit & Loan Officers
4. Financial Advisors & Wealth Managers
5. Insurance Sales & Claims Executives
6. Fintech Customer Support Teams
7. Branch Managers & Supervisors
8. Call Center & Contact Center Agents in BFSI

Course Modules

Module 1: Foundations of Banking Communication Excellence

- Principles of professional banking communication
- Clarity in financial language usage
- Tone, etiquette, and trust-building
- Customer-first communication mindset
- Case Study: Resolving miscommunication in retail banking onboarding delays

Module 2: Digital Banking & Omnichannel Communication

- Email, chat, WhatsApp banking communication standards
- AI chatbot interaction best practices
- Social media banking response protocols

- Managing customer expectations across channels
- Case Study: Improving response time in mobile banking support queries

Module 3: Customer Experience (CX) & Relationship Communication

- Building long-term customer trust
- Personalization in banking conversations
- Customer journey mapping in BFSI
- Handling high-value clients
- Case Study: Retaining a premium customer through proactive engagement

Module 4: Sales Communication & Financial Advisory Skills

- Cross-selling and upselling techniques
- Needs-based financial advisory communication
- Persuasive communication without pressure selling
- Handling objections effectively
- Case Study: Increasing loan conversion through consultative selling

Module 5: Compliance, Risk & Regulatory Communication

- Clear communication of KYC/AML requirements
- Fraud risk awareness messaging
- Transparent disclosure practices
- Regulatory communication standards
- Case Study: Preventing fraud through improved customer alerts

Module 6: Conflict Management & Difficult Conversations

- Handling angry or dissatisfied customers
- Emotional intelligence in banking communication
- Complaint resolution frameworks
- De-escalation techniques
- Case Study: Resolving a disputed transaction effectively

Module 7: Leadership & Internal Stakeholder Communication

- Communication flow between departments
- Reporting and escalation best practices
- Leadership communication in branches
- Team collaboration in BFSI environments
- Case Study: Improving branch efficiency through better internal coordination

Module 8: Advanced Financial Communication & Storytelling

- Simplifying complex financial products
- Data-driven communication in banking
- Storytelling for financial literacy
- Presentations for clients and stakeholders
- Case Study: Explaining investment portfolios to first-time investors

Training Methodology

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com