



Banking Service Innovation and Scaling Training Course

11 – 15 January 2027
Montreux

Banking Service Innovation and Scaling Training Course

Ref: 409_133252 **Date:** 11 – 15 January 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Banking Service Innovation and Scaling Training Course is a five-day advanced course for banking leaders who leave with a Banking Service Innovation and Scale Pack. The course applies banking service innovation to customer problem evidence, end-to-end journey mapping, value proposition testing, service prototyping, risk-by-design, pilot measurement, and scale decisions. Participants connect customer desirability with operating, data, technology, risk, and compliance feasibility. Agile Leaders Training Center delivers this course on banking service design and scaling.

Who Should Attend

- Product and innovation functions responsible for service concepts, propositions, and portfolios
- Customer-experience functions responsible for journey evidence, touchpoints, and service outcomes
- Operations functions responsible for workflows, capacity, exceptions, and service delivery
- Digital, data, and technology functions responsible for channels, enablers, and integration
- Risk and compliance functions responsible for controls, obligations, and approval evidence
- Business functions responsible for pilots, investment choices, adoption, and scaling

The course assumes participants already design, govern, or improve banking services and leaves out introductory design thinking, software engineering, detailed product management, and specialist regulatory interpretation.

Departments and Industries

The course supports service innovation decisions across banking and other regulated service organizations.

- Retail, commercial, corporate, transaction, and private banking businesses
- Payments, lending, deposits, cards, and customer-service operations
- Finance companies, insurance providers, and regulated payment businesses
- Digital-channel, data, technology, and service-design departments
- Risk, compliance, legal, assurance, and operational-control functions
- Advisory teams supporting customer journeys and service transformation

Learning Objectives

By the end of this course, participants will be able to:



- Diagnose customer problems across end-to-end banking journeys
- Build value propositions and banking service blueprints
- Apply service prototyping and assumption-testing methods
- Evaluate data, technology, risk, and compliance feasibility
- Use pilot metrics to compare service evidence
- Prioritize an innovation portfolio and scale validated services

Course Agenda

Day 1: Service Opportunity Discovery

- Bank Customer Problem Evidence Brief
- Customer and Business Outcome Tree
- End-to-End Banking Journey Map
- Touchpoint Friction and Root-Cause Analysis
- Service Opportunity Prioritization Matrix

Day 2: Service Concept and Value Design

- Banking Service Value Proposition Canvas
- Customer Segment and Jobs-to-Be-Done Map
- Service Concept Option Card
- Frontstage and Backstage Service Blueprint
- Operating Model and Decision-Rights Canvas

Day 3: Prototyping and Risk by Design

- Service Prototype Fidelity Ladder
- Assumption and Experiment Backlog
- Data and Technology Enabler Map
- Risk, Compliance, and Control-by-Design Canvas
- Prototype Test and Evidence Log

Day 4: Pilot, Portfolio, and Scale

- Banking Service Pilot Charter
- Pilot Metric and Learning Scorecard
- Innovation Portfolio Prioritization Grid
- Readiness, Dependency, and Adoption Map
- Scale Decision and Rollout Roadmap



Day 5: Banking Service Innovation Practice

- Suggested Exercise: Customer Problem and Journey Diagnosis
- Suggested Exercise: Value Proposition and Service Blueprint
- Suggested Exercise: Prototype and Control-by-Design Review
- Suggested Exercise: Pilot Evidence and Scale Decision
- Capstone Exercise: Banking Service Innovation and Scale Pack

Practical Exercises

The course uses suggested activities to convert banking service evidence into testable and governable decisions.

- Suggested activity: diagnose a lending or payments journey and prioritize service opportunities from customer and business evidence.
- Suggested activity: build a value proposition, service blueprint, prototype, and assumption test for a selected concept.
- Suggested activity: integrate operating, data, technology, risk, and compliance requirements into a pilot design.
- Suggested activity: compare pilot evidence, prioritize the innovation portfolio, and present a scale decision.

FAQs

Who suits banking service innovation training, and what does it assume?

Banking service innovation training suits leaders and specialists who already design, govern, deliver, or improve financial services and can work with customer, operational, risk, and performance evidence.

How does banking service innovation differ from general design thinking training?

Banking service innovation applies discovery and prototyping to regulated service journeys, operating models, controls, pilots, portfolios, and scale decisions; general design thinking training usually teaches broader problem-solving methods.

What evidence supports a banking service pilot decision?

A banking service pilot decision needs customer response, journey performance, operational feasibility, data and technology readiness, control effectiveness, adoption evidence, costs, dependencies, and defined learning thresholds.



How should risk and compliance enter banking service design?

Risk and compliance should enter banking service design through early assumptions, control requirements, decision rights, prototype tests, exception paths, evidence records, and approval gates rather than after the service is built.

How can a bank decide whether to scale an innovative service?

A bank can decide whether to scale by comparing pilot outcomes with customer, business, operating, technology, risk, compliance, adoption, and readiness criteria, then documenting dependencies and rollout conditions.

Conclusion

Participants leave with a Banking Service Innovation and Scale Pack containing problem evidence, journey maps, value propositions, service blueprints, prototypes, control records, pilot measures, portfolio choices, and a rollout roadmap. The pack changes disconnected ideas into evidence-based service decisions. It supports accountable collaboration from discovery through piloting and scale.