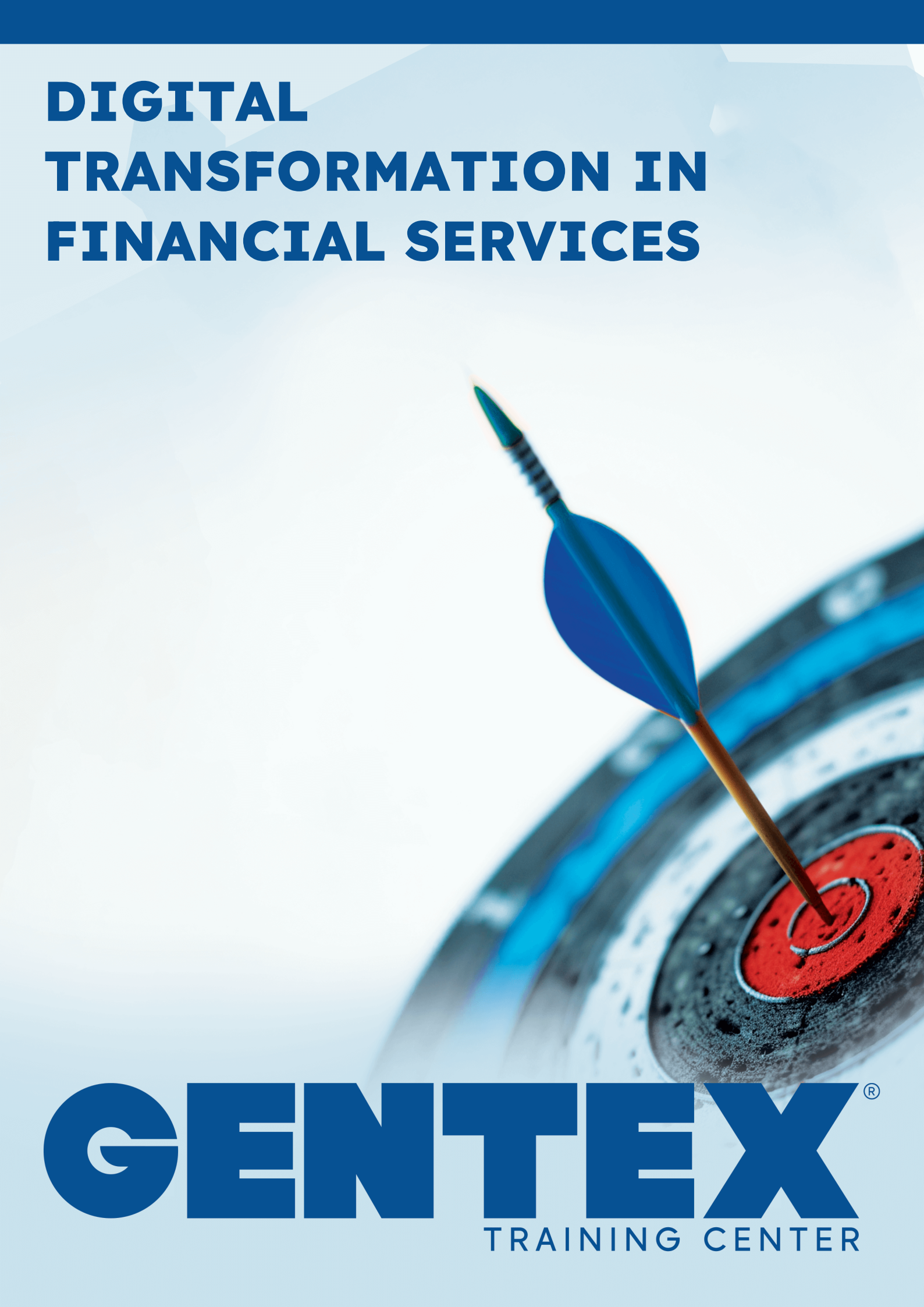
DIGITAL TRANSFORMATION IN FINANCIAL SERVICES



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TRAINING CENTER

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Introduction

Digital Transformation in Financial Services Training Course builds the strategic and operational capability that banking and insurance leaders need to modernise their institutions end to end. Financial services transformation touches every layer: customer channels, core systems, data, talent, and regulation. Institutions that transform in fragments achieve scattered results, while those that transform coherently change how they compete. This course develops the coherence that produces results. It covers transformation strategy, digital operating models, and customer experience design. Furthermore, it applies data, analytics, and cloud modernisation. In addition, it develops agile delivery, cyber resilience, and regulatory compliance. As a result, participants lead transformation with structure and measurable outcomes.

Digital Transformation in Financial Services Course Objectives

- Explain digital transformation drivers and financial sector disruption.
- Assess digital maturity and prioritise transformation initiatives.
- Design digital operating models and organisational structures.
- Apply customer journey mapping and experience design.
- Apply data, analytics, and AI to financial services processes.
- Design cloud adoption and core system modernisation approaches.
- Apply agile delivery methods and product operating models.
- Apply cybersecurity, resilience, and data privacy requirements.
- Address regulatory, conduct, and outsourcing obligations.
- Build transformation roadmaps, business cases, and benefits tracking.

Course Methodology

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- Interactive lectures with real financial sector transformation cases.
- Digital maturity, process, and journey mapping workshops.
- Data, analytics, and cloud adoption exercises.
- Agile delivery, governance, and change management practice.
- Structured peer review with facilitator feedback on transformation plans.

Who Should Take This Course

- Banking, insurance, and financial services executives.
- Digital transformation and innovation leads.
- Product owners and channel managers.
- Operations and technology managers.
- Risk, compliance, and information security officers.
- Consultants advising on financial services transformation.

Digital Transformation in Financial Services Course Outlines

Day 1: Transformation Strategy and Market Disruption

- Transformation drivers: customers, competition, and regulation.
- Financial sector disruption and emerging business models.
- Digital maturity models and capability benchmarking.
- Transformation vision, objectives, and success measures.
- Business case development and benefits realisation planning.
- Transformation governance and steering structures.
- Case study: assessing transformation priorities for a financial institution.

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Day 2: Digital Operating Models and Customer Experience

- Digital operating model design and organisational structures.
- Shared services, centres of excellence, and agile squads.
- Customer journey mapping and pain point analysis.
- Omnichannel design and digital channel strategy.
- Service design and straight-through processing.
- Digital onboarding, KYC, and identity verification.
- Workshop: mapping a customer journey and designing digital improvements.

Day 3: Data, Analytics, and AI Enablement

- Data architecture, governance, and quality management.
- Advanced analytics for risk, pricing, and customer insight.
- AI use cases in credit, fraud detection, and service automation.
- Machine learning model development and validation basics.
- Business intelligence tools and dashboard design.
- Data privacy, consent management, and ethical use of AI.
- Workshop: designing an analytics or AI use case for a finance process.

Day 4: Core Modernisation, Cloud, and Agile Delivery

- Legacy modernisation and core banking replacement options.
- Cloud adoption models and migration strategies.
- API-first architecture and integration layers.
- Agile delivery methods, sprint planning, and product backlogs.

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- DevOps, automation, and release management.
- Vendor selection, build-versus-buy, and delivery governance.
- Workshop: planning a core modernisation or cloud migration phase.

Day 5: Risk, Regulation, Resilience, and Value Realisation

- Cybersecurity frameworks and threat management.
- Operational resilience and business continuity planning.
- Third-party and cloud outsourcing risk management.
- Regulatory compliance, conduct, and consumer protection duties.
- Change management, culture, and skills development.
- Benefits tracking, KPI frameworks, and board reporting.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Digital Transformation in Financial Services, participants will gain a thorough understanding of transformation strategy and market disruption, digital operating models and customer experience, data, analytics and AI enablement, core modernisation, cloud and agile delivery, and risk, regulation, resilience and value realisation. They will also acquire practical skills in financial services transformation strategy and maturity assessment, digital operating model and customer experience design, data, analytics and AI enablement, and transformation risk, governance and value realisation. In addition, the course prepares them to lead institutional change with clear structure and measurable benefit. Gentex Training Center delivers this programme with a strong focus on applied financial sector transformation and disciplined delivery.

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FAQs for Digital Transformation in Financial Services course

Q1 What is the "Digital Transformation in Financial Services" course about?

It is a five-day programme on modernising financial institutions end to end. It covers transformation strategy and market disruption, digital operating models and customer experience, data, analytics and AI, core modernisation, cloud and agile delivery, and risk, regulation and value realisation.

Q2 What are the key benefits of the "Digital Transformation in Financial Services" course?

Participants lead transformation with stronger structure and measurable outcomes. The course improves maturity assessment and prioritisation, sharpens operating model and journey design, strengthens analytics and AI use case selection, improves cloud and core modernisation planning, and raises resilience, regulatory and benefits realisation quality.

Q3 What skills will I gain from the "Digital Transformation in Financial Services" course?

Participants gain financial services transformation strategy and maturity assessment, digital operating model and customer experience design, data, analytics and AI enablement, and transformation risk, governance and value realisation. These four skills cover the practical core of this work.

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Q4 What tools, methods, or standards are covered in the "Digital Transformation in Financial Services" course?

The course covers digital maturity models, disruption and business model analysis, capability benchmarking, business case and benefits realisation planning, transformation governance design, digital operating model design, shared services and centre of excellence models, agile squad structures, customer journey mapping, omnichannel and channel strategy design, service design and straight-through processing, digital onboarding, KYC and identity verification, data architecture and governance, data quality management, advanced analytics for risk and pricing, AI use cases in credit and fraud detection, machine learning model development and validation, business intelligence dashboard design, data privacy and consent management, legacy modernisation and core banking replacement options, cloud adoption and migration strategies, API-first architecture, agile delivery methods and sprint planning, DevOps and release management, build-versus-buy and vendor selection, cybersecurity frameworks, operational resilience and business continuity planning, third-party and cloud outsourcing risk management, regulatory compliance and conduct duties, change management and skills development, and benefits tracking with KPI frameworks.

Q5 How is the "Digital Transformation in Financial Services" course applied in real-world practice?

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Participants apply the methods to real and simulated financial institutions. They assess digital maturity and set priorities, design digital operating models, map customer journeys and redesign onboarding, select analytics and AI use cases, plan cloud migration and core modernisation phases, apply agile delivery and release practices, assess cyber and outsourcing risk, address regulatory and conduct duties, manage change, and build benefits tracking and board reporting. Many leave with a maturity assessment framework, a transformation roadmap template, and a benefits tracking scorecard ready to use.