



Workshop on Customer Analytics in Banking and Financial Services

July

15 – 18, 2019

Coordinator
Prof Ateeque Shaikh



National Institute of
Bank Management
Pune, India

Workshop on Customer Analytics in Banking and Financial Services

Background

The current competitive environment coupled with the ever changing technological environment in the banking sector makes it imperative for the banks to have a systematic understanding and preferences of the customers. Further, the increased use of digital channels in banking have resulted in very little face-to-face interactions between bankers and customers. Therefore, Banks need to leverage their customer relationship management (CRM) data to identify and exploit newer leads for customer acquisition based on targeted marketing campaign. After acquiring the customers, banks also need to retain the customer as the cost of acquiring a new customer far exceeds the cost of retaining a customer. Customer churn and retention modeling will help banks retain their customers. Further, banks also need to focus on the cross-sell, up-sell and increasing the share of wallet of the customers for increasing the profitability of the customers.

Against this backdrop the captioned programme is being conducted to enable the participants to understand Customer Analytics projects in its entirety to derive customer insights for business growth. This programme will enable the participants to understand how banks can utilize customers' demographic, transactional data and spending pattern by building models in the areas of customer acquisition, cross-selling and customer churn. During the programme, the participants will also learn different analytical techniques such as linear regression for forecasting customer profitability, logistic regression for customer churn and retention modeling, cluster analysis for market segmentation and personalization. The programme will use a hands on approach through case examples with data from the banking and financial services to equip participants for adopting Customer Analytics in their organisational decision making.

Programme Highlights

- To help participants understand how to design Customer Analytics projects with use case studies
- To help participants understand steps involved in building a predictive models

- To provide insights into the way customer analytics techniques are used to analyse: consumer behaviour, segmentation, customer cross-selling and up-selling, campaign design and analytics, and social media analytics.
- To equip participants with ready-to-use designs and analytical tool-kits that can be used for real life marketing practices in banks.

Course Contents

- The building blocks of customer analytics – tools and techniques
- Basics of statistics for customer analytics
- Data Visualization for customer 360 view: Product engagement, Channel engagement product basket analysis for cross-sell and up-sell effectiveness.
- Consumer Behaviour: Customer analytics to understand emerging consumer needs and preferences with respect to products and other elements of marketing mix etc.
- Customer Relationship: Interpreting customer individual customer preferences for customer acquisition, customer development through personalized cross-sell offers and product basket analysis and customer churn etc.
- Understanding the use of cluster analysis for customer segmentation based on transaction data of the customers
- Data Driven Targeted Marketing Campaign
- Website and social media analytics: Using website and social media analytics for better decision making

Target Group

Marketing and Planning Departments in Banks. Customer Service Departments, Zonal, Regional, Circle offices - Marketing and Sales Managers, Analytics team members, Digital and social media marketing team members.

Pedagogy

The programme pedagogy will involve interactive lectures, case analysis, hands on analytical exercises and group projects in addition to practical orientation through interaction with banking professionals.

Dates

July 15– 18, 2019 (4 days)

The programme will commence at 9:00 am on Monday, July 15 and will conclude by 5:00 p.m. on Thursday, July 18, 2019.

Venue

NIBM Campus, Kondhwe Khurd
Pune, India.

Accommodation

The workshop is fully residential. Participants will be provided well-furnished single room AC accommodation in the Institute's hostel complex on the campus. However, they will not be permitted to bring their family members to stay on the campus. In case any Officer/Executive with physical/medical disability is being nominated, kindly inform us in advance with particulars of disability to facilitate necessary arrangements.

The Institute has facilities for outdoor and indoor games and a large walking/jogging trail for physical fitness besides a yoga centre. Participants are therefore encouraged to bring appropriate clothes/gear.

Programme Coordinator

Prof Ateeque Shaikh

Assistant Professor

(Strategic Planning, Marketing and Control Area Group)

Programme Fee (per participant)

US \$ 1600 for foreign participant

(See fee structure on home page of the website for incentive)

	Fee	GST	Fee+ GST	TDS
Member Banks :	36000	6480	42480	3600
Non-Member Banks :	42000	7560	49560	4200

The fee includes the cost of tuition, board and lodging facilities, teaching material, etc. (Goods and Services Tax (GST) @ 18%, and TDS @ 10%. Kindly send the TDS Certificate on priority to NIBM).

Nominations and Enquiries

Please address your enquiries and nominations to:

Prof Ateeque Shaikh

Programme Coordinator

National Institute of Bank Management

NIBM Post office, Kondhwe Khurd

Pune 411 048, India

Tel : 0091-20-26716000 (EPABX)

0091-20-26716115 (Direct)

Fax : 0091-20-26834478

E-mail : a.shaikh@nibmindia.org

Web : www.nibmindia.org

Mode of Payment for Indian Participants

- The fee may preferably be transferred by RTGS/NEFT/ECS to our A/c No. 20002400021 with Bank of Maharashtra, NIBM Branch, Pune (IFSC Code MAHB0001124). NIBM PAN No. AAATN0040P and NIBM GSTIN No. 27AAATN0040P1ZJ.
- National Institute of Bank Management
NIBM Post Office, Kondhwe Khurd, Pune 411 048, INDIA.

Mode of Payment for Foreign Participants

Mode of Remittance: SWIFT*

- Name & Address of our Bankers : **Oriental Bank of Commerce
C-2, Shop No. 4-5, Bramha Estate
Kondhwe Khurd, Pune 411 048
Maharashtra, India**
- Name of the Account : **National Institute of Bank Management**
- NIBM's Bank Account No. with Oriental Bank of Commerce : **Current A/C 11281131004402**
- Bank's Swift Code : **ORBCINBBFCP**
- Oriental Bank of Commerce A/c No. with Correspondent Bank : **36152559**
- Preferred currency : **USD**
- Correspondent Bank : **CITIBANK N.A.**
- Swift code for Citi Bank : **CITIUS33**

*** The Foreign Bank Charges/ SWIFT charges/Commission is to be borne by the remitter. The fees mentioned in the invoice/brochure is to be paid to NIBM, net of all bank charges.**

***Payments will be accepted only through electronic mode.
Cheques/DDs/Pay Orders will not be accepted.**

- **For all electronic remittances, kindly send a confirmatory e-mail at: accounts@nibmindia.org giving details of the remitter participant, name and dates of programme, etc.**

Last Date for

Receiving Nominations:

July 5, 2019

Last Date for

Availing Early Bird Incentive of 5%

June 29, 2019

(See Fee Structure on home page of the website)

Please see programme fee structure on home page of the website for early bird incentive, incentives for SAARC and other developing countries, mode of remittance, Pune City route map and local conveyance.