Service Journey Personalisation Training Course for CX Leaders: Signals, Rules and Consent

17 – 21 May 2027
Milan

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Programme Summary

Service journey personalisation with AI, covering customer signals, next best action rules and consent, is the subject of this one-week training course for customer experience, service and contact centre leaders, ending in a personalisation design pack for one service journey. Tailoring can raise relevance, yet it can also feel intrusive, unfair or wrong when signals, rules and consent are not agreed first. The programme moves from journey moments to signals, decision rules, models, trust controls and measurement, using prepared service data. Mars Training Centre UK delivers this programme on service journey personalisation to mixed-organisation cohorts.

The Business Case

Banks, telecoms operators, airlines and public services handle millions of service contacts, and each is a chance to help or to annoy. Leaders who can choose which moments to personalise, which data may be used and how an action is decided can improve service without eroding trust, and can show the board how they know it worked.

- Resolution Effort: Falls when the next action offered fits the customer's situation and the agent's tools.
- Customer Trust: Is protected when consent, fairness and the limits of tailoring are set before launch.
- Service Cost: Is better controlled when personalisation is tested against control groups before it is scaled.

Principles and Evidence Base

- ISO 18295-1: The standard on requirements for customer contact centres, applied in Session 1 to define the service moments and contact standards that personalisation must respect.
- ISO 10002: The guidelines on complaints handling, applied in Session 4 to treat complaints about tailoring as a signal.
- ISO/IEC 42001: The management system standard for AI, applied in Session 4 to set ownership of decision models.
- NIST AI Risk Management Framework: A voluntary framework for managing AI risk, applied in Session 4 to test bias and harm in tailored actions.

Intended Participants

- Customer experience leaders who own journeys and decide where to tailor them.
- Service and contact centre managers who run the channels where tailored actions appear.
- Digital and data product owners who supply the signals and decision tools.
- Risk, privacy and quality leads who set the limits on data use.

Typical settings include retail banking, telecommunications, airlines and public service agencies.

Learning Outcomes

1. Participants will be able to prioritise service moments for personalisation by value, effort and risk.
2. Participants will be able to evaluate customer signals for relevance, quality and permitted use.
3. Participants will be able to construct next best action rules with clear triggers, limits and an owner.
4. Participants will be able to diagnose bias, intrusion and error in tailored service actions.
5. Participants will be able to compare test and control results to judge whether tailoring worked.
6. Participants will be able to justify a personalisation design to a service committee.

Programme Structure

Day 1: Service Journey Personalisation Foundations

Which service moments are worth tailoring?

- Journey Moment Map
- Segment Versus Individual Tailoring Review
- ISO 18295-1 Contact Standard Check
- Value and Effort Scoring Grid
- Personalisation Scope Statement

Day 2: Customer Signals and Consent

Which data may be used, and on what basis?

- Signal Inventory
- Signal Quality Check
- Consent and Preference Register
- Purpose and Permission Matrix
- Data Minimisation Review

Day 3: Next Best Action Rules and Models

How is the action for one customer chosen?

- Trigger and Eligibility Rule Sheet
- Action Library
- Propensity Score Reading
- Frequency and Fatigue Cap
- Agent Guidance Prompt Design

Day 4: Trust, Fairness and Oversight

When does tailoring become intrusive or unfair?

- Intrusion Test Checklist
- Bias and Fairness Screen
- NIST AI Risk Management Framework Mapping
- ISO/IEC 42001 Ownership Review
- ISO 10002 Complaint Signal Route

Day 5: Design Pack for One Service Journey

Do the findings join into a design a committee can approve?

- Applying the Session 1 Journey Moment Map
- Checking the Session 2 Permission Matrix
- Testing the Session 3 Action Library
- Defining Test and Control Groups
- Completing the Personalisation Design Pack

Methodology

The programme is a structured exercise built on prepared service data for a retail bank and a telecommunications provider. Participants map moments, vet signals, write decision rules and test fairness, then defend a design to peers acting as a service committee.

- Suggested activity: Scoring ten service moments on value, effort and risk.
- Suggested activity: Writing three next best action rules with triggers and caps.
- Suggested activity: Running an intrusion test on a prepared set of tailored messages.

Capstone Output

Each participant completes a personalisation design pack for one service journey. It holds the moment map, a permission matrix, an action library with rules, a fairness screen and a test plan with control groups. At work it goes to the service committee for approval and sets the routine for later tailoring decisions.

Frequently Asked Questions

Is service journey personalisation training suitable for leaders who are not data specialists?

Yes. Service journey personalisation is taught through prepared service data and templates. You need responsibility for customer experience, service or contact centre operations, but no analytics or programming background.

Which standards does service journey personalisation rest on in this training?

Service journey personalisation here rests on ISO 18295-1, ISO 10002, ISO/IEC 42001 and the NIST AI Risk Management Framework, each applied to a service, trust or ownership decision.

How is the design pack from service journey personalisation training used at work?

You put the personalisation design pack to your service committee, use its permission matrix to limit data use, and keep its test plan as the routine for later tailoring.

How does service journey personalisation differ from a programme on marketing campaign analytics?

Service journey personalisation concentrates on tailoring support and service contacts under consent and fairness limits, while a programme on marketing campaign analytics concentrates on targeting and measuring promotional campaigns.