



**Estu**

# **Customer Focused Innovation —**

**For Financial & Professional  
Services**

CMI LEVEL 5  
SKILLS BOOTCAMP

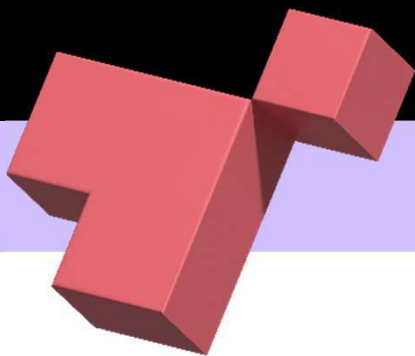


**Funded by  
UK Government**



**[estuglobal.com](http://estuglobal.com)**

# Learning for the real world



## Customer Focused Innovation for Financial & Professional Services

Financial and Professional Services teams are under pressure to adapt quickly. Clients expect more clarity, more consistency and more value. Regulation keeps shifting. Technology is rewriting the way services are delivered.

This **10-week programme** gives your managers and leaders the tools, confidence and structured methods to respond with purpose, strengthen client relationships and improve service performance across the organisation.

Explore how to understand clients more deeply, improve the end-to-end journey and design better services that support commercial growth. Work on **real challenges and opportunities** from inside your organisation, so every insight can be applied immediately.

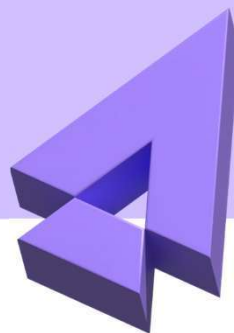
Through a blend of live online learning, expert masterclasses and in-person workshops, your teams build **practical capability** in service design, data-led decision making, communication and innovation methods. By the end, they are equipped to increase client retention, attract new audiences and shape improvements that have measurable impact.

Graduates receive the **CMI Level 5 Award in Principles of Innovation**, with **70-90% government funding** available to eligible employers.



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# Overview



**Audience:** Managers and Senior Leaders within Financial and Professional Services

## Skills gained:

Customer  
Retention

Data Driven  
Decision Making

Strategic Service  
Design

User-Centred  
Value Propositions

Innovation  
Methodologies

Impactful  
Communication

Measuring  
Customer Success

Optimising the  
Customer Journey

Attracting New  
Audiences

AI for  
Financial Services

## Business outcomes:



Improve customer engagement and retention



Attract new customer audiences



Enhanced value propositions



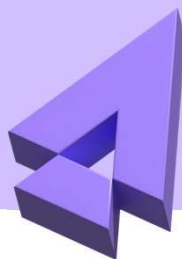
Successful innovation

**Qualification:** CMI Level 5 Award in Management & Leadership

**Duration:** 10 weeks — delivered through a flexible blend of live online and in-person learning, supported by individual coaching

**Funded training:** Government funding is available to cover 70-90% of the £3,950 fee per participant for eligible employers. Contact us to find out more:

# Modules

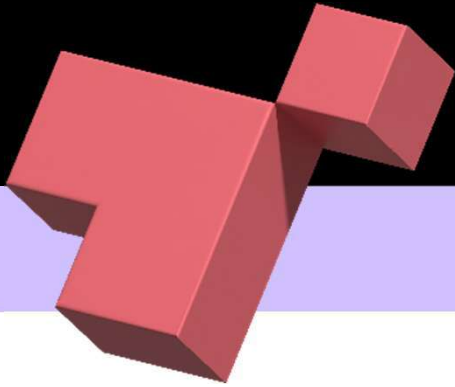


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<b>Introduction to Design for Customer Innovation in Financial Services</b> Methods to solve problems, identify triggers for innovation, and create improved customer experiences that deliver value.	In-person 9am - 5pm
<b>Insight &amp; Epiphanies</b> Methods for researching your own markets and customers.	Live online 9am - 12.30pm
<b>Mapping the Customer Journey</b> Explore the client journey; identifying the process and details that elevate the experience and value.	Live online 9am - 12.30pm
<b>Framing the Brief</b> From research to action; mapping new systems and how they impact on clients and competitive advantage.	Live online 9am - 12.30pm
<b>Communicating with Impact</b> Strengthen your influence through storytelling, negotiation, and stakeholder engagement.	In-person 9am - 5pm
<b>Gathering Data &amp; Customer Innovation in Financial Services — Masterclass</b>	Live online 12 noon - 2pm
<b>CMI Assignment Support</b>	Live online 9am – 12:30pm
<b>Creating &amp; Testing New Ideas; Future Journey</b> Creating new solutions to improve client services. Gain inspiration from other industries and use research to trigger new ideas.	In-person 9am - 5pm
<b>Prototypes</b> Rapid prototyping tools and early user testing to reduce risk and build confidence in new solutions.	Live online 9am - 12.30pm
<b>Insights into Impact in Financial Services — Masterclass</b>	Live online 1pm-3pm
<b>Developing Concepts</b> (1:1 tutorials) Mapping elements of the organisation to deliver success.	Live online 9am - 12.30pm
<b>Blueprints, Buy-in &amp; Storytelling</b> Implement innovation concepts across your organisation.	In-person 9am – 5pm
<b>Showcase &amp; Impact Presentations</b> Communicate with impact; present your market innovation plan.	Live online 9am – 12.30pm

Running order and content of modules subject to change.

# Meet the Tutors



## **Martin Dowson, Tutor**

- Martin is a highly experienced advisor on embedding design-led change and innovation in Financial Services
- Previous roles in FS include Head of DesignOps & EcoSystems at Lloyds Banking Group, Service Design Capability Lead at NatWest, and CX Consultant at HSBC
- Former Partner at Wipro Digital – leading FS and TelCo design-led transformation programmes



## **Madelaine McLaughlin, Tutor**

- Madelaine leverages her experience as a Royal College of Art graduate and entrepreneur
- As an accomplished innovation specialist, she inspires creativity and the application of learning

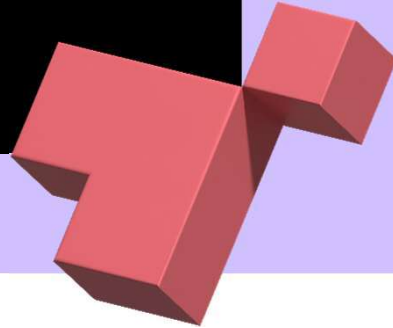


## **Fiona Drummond, Communication Trainer**

- A communication trainer and facilitator who uses theatre-based techniques to help professionals enhance their presence, impact, and connection.
- With a background as an actor and director, Fiona brings rich storytelling and performance experience to her training.

# What are people saying about Estu programmes?

**Estu**



**"Rarely does a course surpass all expectations, this one did — Brilliant!"**

Linda Hausmanis,  
CEO, IWFM

**"The support was excellent from day one. It was very clear that this was not a normal course."**

Adam Morse  
MD, Sustain Homes Ltd

**"I would recommend Estu programmes to any business leader interested in transformation."**

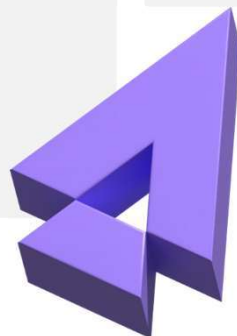
Chris Tredget  
MD, Willmott Dixon

**"By far the most impactful training our team has completed. What sets Estu's bootcamps apart is the focus on real outcomes – everything we learned was applied immediately."**

Lisa Di Cuffa,  
Founder & Marketing Director, Thyme

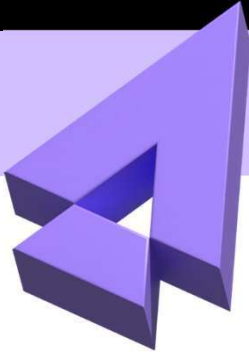
**"The networking element was fantastic...it's rare you're in a room with people like that."**

Oliver Eggenton  
Director, TwoEighty Consultants





# Let's make it happen

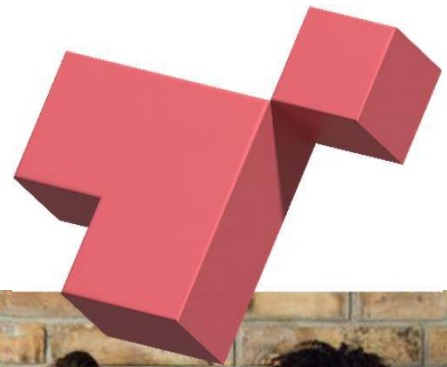


Ready to turn ambition into action? Register your team for the Customer Focused Innovation for Financial & Professional Services Bootcamp today:

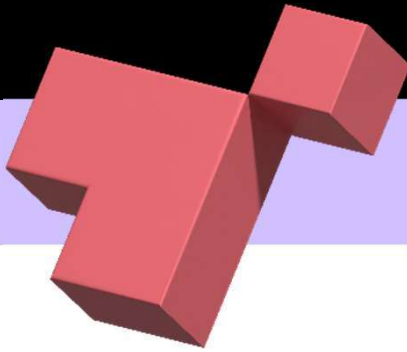
✉ Contact us: [support@estuglobal.com](mailto:support@estuglobal.com)

🌐 Find out more: [www.estuglobal.com](http://www.estuglobal.com)

Our team will be in touch to shape the next steps — and get you moving.



# About Estu



Learning should move you forward. At Estu, we create clear, practical programmes that help people build confidence, strengthen capability, and deliver meaningful results at work.

Our courses are designed for simplicity and real-world application. You learn from experienced tutors who understand how organisations operate, supported by a community of peers who share your drive to progress.

If you want to take your next step with clarity and support, explore our wider range of Skills Bootcamps and professional Apprenticeships. We are here to help you grow with confidence.



## Team Innovation – Sustainability

Level 5 Skills Bootcamp

**Duration:** 10 weeks

**Qualification:** CMI Level 5 Award



## Team Innovation – Operationalising AI

Level 5 Skills Bootcamp

**Duration:** 10 weeks

**Qualification:** Estu completion certificate



## Commercial Innovation & Change Leadership

Level 6 Service Designer Apprenticeship

**Duration:** 18 months

**Qualification:** CMI Level 6 Award