



Certificate in Digital Process Automation and Customer Experience Course

28 February – 4 March 2027
Online





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Certificate in Digital Process Automation and Customer Experience Course is a 5-day foundation course on removing manual work from everyday processes and improving how customers are served. It is for department managers, business unit leads and professionals in private-sector organizations. You practice on cases and leave with a completed Automation and Customer Experience Improvement Plan for your own unit. The course is delivered by Mercury Training Center.

About This Course

Many units still rely on emails, spreadsheets and re-keyed data, so customers wait and staff repeat the same steps. To follow this course you should run or improve a process that serves internal or external customers. You practice by mapping case workflows, choosing what to automate and redesigning customer journeys step by step.

Who It Is For

- Managers responsible for the speed and quality of a department's daily operations
- Business unit leads who decide which improvement ideas receive time and budget
- Process owners and operations staff who run order, request and approval workflows
- Customer service and sales staff responsible for how customers contact and are answered by the organization
- Professionals who represent their unit in automation or system projects

This course is not for developers who want to build automations in a specific tool, who are better served by a technical course on that platform, nor for senior executives who want enterprise transformation strategy, who are better served by a leadership course at board level.

Competencies You Will Build

- Process Discovery: you document how work actually flows, including delays, rework and handoffs
- Automation Candidate Selection: you pick tasks to automate by volume, rules and value rather than by trend
- Workflow Redesign: you simplify a process before any tool is applied to it
- Customer Journey Design: you map customer touchpoints and remove the moments that cause friction
- Automation Adoption: you prepare staff and customers to use new digital steps
- Service Performance Tracking: you measure cycle time, errors and customer effort before and after change

What You Will Be Able to Do

By the end of the course you will be able to:

- From observation notes and staff interviews, draw a current-state swimlane map that marks waste and rework
- Given a task inventory, score each task on an automation suitability checklist and select three candidates
- Using the current-state map, design a future-state workflow that shows removed, simplified and automated steps
- From complaints and contact records, build a customer journey map with pain points and proposed digital fixes
- Given a list of automation options, compare workflow tools, robotic process automation and low-code tools for a selected case
- Using baseline figures, set a before-and-after scorecard for cycle time, error rate and customer effort

Course Content

Day 1: Digital Processes and Customer Expectations

- Digitization, Digitalization and Automation Distinguished in Daily Operations
- How Manual Handoffs Shape Customer Waiting Time and Errors
- Process Maturity Checklist for a Business Unit
- Current-State Swimlane Mapping of an Order or Request Workflow
- Waste, Rework and Delay Identification on the Process Map

Day 2: Automation Options and Candidate Selection

- Workflow and Case Management Tools for Approvals and Requests
- Robotic Process Automation for Rule-Based Data Entry
- Low-Code Tools for Routine Tasks in Business Units
- Artificial Intelligence in Document Handling and Customer Replies
- Automation Suitability Scoring by Volume, Rules and Value

Day 3: Workflow Redesign

- Simplification before Automation: Removing Steps and Approvals
- Future-State Workflow Design with Digital Handoffs
- Data Inputs, Forms and Integration Points between Systems
- Exception Handling and Human Review Points in Automated Flows
- Data Privacy and Access Controls in Automated Processes

Day 4: Customer Journey and Service Channels

- Customer Journey Mapping of Touchpoints and Pain Points
- Customer Effort and Satisfaction Measures at Each Touchpoint
- Self-Service Portals, Chat and Notifications for Status Updates
- Linking Front-Line Service Steps to Back-Office Workflows
- Adoption Planning for Staff and Customers Using New Channels

Day 5: Automation and Customer Experience Improvement Practice

- Before-and-After Scorecard for Cycle Time, Errors and Customer Effort
- Exercise Revisiting Automation Candidates against the Future-State Workflow
- Exercise Testing the Customer Journey Map with Case Complaints
- Exercise Building a Pilot Plan with Adoption Actions
- Completing and Presenting the Automation and Customer Experience Improvement Plan

Case Studies and Exercises

The following are suggested activities used during the course.

- Case study: a retail chain where online orders are re-keyed into the stock system; you redesign the order workflow and choose what to automate.
- Case study: a logistics company whose customers call repeatedly for delivery status; you map the journey and select a self-service fix.
- Exercise: a private clinic handles appointment changes by phone and email; you score tasks for automation suitability.
- Exercise: an insurance claims team receives incomplete forms; you design a digital intake step with a human review point.

What You Take Back

You return with an Automation and Customer Experience Improvement Plan for your own unit. In your first month back you use it to agree one pilot process with your manager, record baseline figures and start redesigning the workflow before any tool is purchased.

- Current-state and future-state workflow maps
- Scored list of automation candidates
- Customer journey map with proposed digital fixes
- Before-and-after scorecard and pilot plan

Quick Answers FAQ

What should I know before a process automation and customer experience course?

You need working knowledge of how your unit handles requests, orders or customer contacts. No programming background is needed, since each automation option is explained in business terms before you apply it to cases.

How does a process automation and customer experience course differ from a digital transformation leadership course?

A leadership course focuses on enterprise vision, governance and sponsorship. This foundation course works at unit level on specific workflows and customer journeys, so you decide what to simplify, what to automate and how to measure the result.

Should a process be redesigned before it is automated?

Yes. Automating a poor process usually makes errors happen faster. Removing unnecessary steps, approvals and rework first keeps the automation simpler, cheaper to maintain and more useful to customers and staff.

What do I take back from process automation and customer experience training?

You take back an Automation and Customer Experience Improvement Plan with workflow maps, scored automation candidates, a customer journey map and a before-and-after scorecard for one process in your own unit.

For Your Manager

After the course, your team member will be able to map a process, remove waste, select tasks suitable for automation and redesign the related customer journey. They return with an Automation and Customer Experience Improvement Plan, first used to agree a pilot process, record baseline figures and track cycle time, errors and customer effort.