

“Plans are only good intentions unless they immediately degenerate into hard work.”

Peter Drucker

Strategic Management for Banks

Part 2: Implementing the Strategy

OVERVIEW

This course provides a rigorous methodology for the implementation and execution of a bank's strategy. It is Part 2 of GBRW Learning's three-part programme for bankers wanting to improve their strategic management skills. It can be taken as a stand-alone course, or complemented with the two other parts of this training suite - 'Formulating the Strategy' and 'Monitoring Strategic Performance'.

The course covers critical ingredients of effective strategic management that are often neglected – how to translate a strategic plan into quantified measures and targets and an action plan, and how to drive and manage strategic change across the organisation systematically and smoothly.

This course will therefore focus on helping banking planners and leaders to overcome the organisational inertia which often prevents the effective implementation of otherwise sound strategic plans. It will introduce practical concepts and tools including the Balanced Scorecard (the world's leading strategic management framework) and cover the key principles of effective Project Management.

WHO SHOULD ATTEND?

The course may be of particular interest to those working in strategy, business planning, finance or marketing functions within a commercial bank. But we believe that “strategy is everyone's business” so the course will be equally relevant for senior leaders, heads of business units and any members of a bank's staff who are interested or involved in the formulation or execution of strategy. It will be useful for those in supervisory or executive roles, or in functional divisions or departments such as Retail, SME or Corporate Banking, Finance, Human Resources, Risk Management, IT, Operations or others. If you are asking yourself any of the following questions, then it is definitely for you:

- *Why is it so difficult to implement our strategy, even though everyone agrees it is necessary?*
- *How can we translate high-level strategic goals into measurable targets and operational plans?*
- *How should objectives and targets be cascaded across business units and personnel?*
- *What tools and techniques could help us to implement to a high standard, on time and within budget?*
- *How can we evolve the organisational culture to make it less resistant to change?*

sharing knowledge, developing skills

OUTLINE

OBJECTIVES

Participants in the course will come away with:

- An appreciation of the key elements required to move from Strategic Planning to practical implementation.
- A clear understanding of the Balanced Scorecard strategic management approach, and practice in the quantification of strategy through Key Performance Indicators
- The ability to develop a coherent plan for the management of strategic change, encompassing the definition of Key Strategic Initiatives and more detailed Project Plans
- A set of Project Management tools, methodologies and templates, tried and tested in the management of change in leading commercial banks.

COURSE DELIVERY

- This is a three-day course totaling **21 hours of delivery time**.
- It consists of **six tutorial modules** approximately 2 hours each (i.e. a total of 12 hours of instruction).
- A further nine hours of the schedule is dedicated to **intensive group work and exercises, underpinned by case studies**, all facilitated by the instructor.
- All hand-outs and instruction will be in English; participants should have a good working knowledge of English.
- The course is **customised** to the specific needs of the client, to ensure maximum relevance and benefit.
- Ideally delegates should have at least three years experience working in a bank either in a general management or leadership role, or employed in a strategy or planning role. Basic familiarity with key concepts of strategy would be helpful.
- Because the course involves participative group work on case studies, and considerable interactivity during tutorials, the number of participants is limited to **no more than 20**.

TRAINING NEEDS ANALYSIS & POST-TRAINING EVALUATION:

To ensure that participants gain maximum benefit from the course, it is our practice to send a detailed questionnaire to all course participants to ensure we fully understand their specific training needs and objectives. The completed questionnaires are analysed by the course instructor who will tailor the course content and style of delivery to the requirements of the participants. Following completion of the course, participants are asked to measure and assess the effectiveness of the training. The results are collated and reviewed, and the analysis shared directly with the relevant client stakeholders.

OUTLINE

MODULE 1: THE STRATEGIC MANAGEMENT PROCESS

- ⇒ Overview of the Strategic Management lifecycle
- ⇒ Understanding the role of strategic planning as just the first stage in Strategic Management
- ⇒ The key reasons for strategic failure and how to overcome these challenges
- ⇒ Key elements of the Strategic Plan: Objectives, Gap Analysis, and Critical Success Factors

MODULE 2: APPLICATION OF THE BALANCED SCORECARD

- ⇒ Evolution and rationale of the Balanced Scorecard methodology
- ⇒ The four scorecard Perspectives: Financial, Customer, Process, and Learning & Growth
- ⇒ How to articulate good Strategic Objectives
- ⇒ Linking Objectives to clear Measures and Targets
- ⇒ Cascading the Balanced Scorecard through the bank

MODULE 3: DEFINING KEY PERFORMANCE INDICATORS

- ⇒ Developing SMART (Specific, Measurable, Attainable, Relevant, Time-bound) KPIs
- ⇒ How to build creative KPIs to quantify subjective criteria
- ⇒ Introduction to the use of dashboards to present and monitor KPIs
- ⇒ Introduction to performance assessment frameworks and linkages to reward and incentivisation policy

MODULE 4: KEY STRATEGIC INITIATIVES

- ⇒ Defining and prioritising Key Strategic Initiatives from the Strategic Plan
- ⇒ Translating KSIs into a tangible portfolio of Projects
- ⇒ The importance and role of the Sponsor or Champion
- ⇒ Breaking down organisational silos: Catalysing cross-divisional and inter-departmental cooperation

MODULE 5: ORGANISING FOR CHANGE

- ⇒ The role of the Strategy Committee and KSI oversight
- ⇒ Using Process Owner Teams to effectively govern processes
- ⇒ Developing and implementing an effective internal communication strategy
- ⇒ Overcoming resistance to change through addressing the 'People Side of Change'

MODULE 6: PRINCIPLES OF A GOOD CHANGE MANAGEMENT METHODOLOGY

- ⇒ Developing a strong Project Plan with realistic milestones and deadlines
- ⇒ Tools and templates for Project governance – budgeting, risk assessment, user assessment, and benefits delivery
- ⇒ Establishing a Change Management function or centre of excellence

DETAILS

FREE TOOLS, MODELS & TEMPLATES

Courses are supplemented with a range of practical documented methodologies, models, tools, and templates refined from best practice, and tried and tested in a range of leading banks. Participants can take these back to the workplace to adapt and apply, and wherever appropriate, to make a tangible improvement to policy and practice in their own bank.

This course includes:

- ➔ **Step-by-step strategic planning guide**
- ➔ **Sample Mission and Vision statements**
- ➔ **Specially tailored Strategic Plan template and model plan**
- ➔ **Financial Forecast model**
- ➔ **Balanced Scorecard template**
- ➔ **Strategy Communications Planner.**

EARLY BOOKING DISCOUNT!
SCHEDULE A COURSE BEFORE THE
31st OF JULY 2014 FOR A 10%
DISCOUNT ON COURSE FEES.

TERMS & CONDITIONS

Total fee cost for the off-site delivery of the three-day course as described is US\$ 11,500 (eleven thousand five hundred United States Dollars). This is EXCLUSIVE of:

- Flights (discounted business class);
- Accommodation (min. 4★) for every night required off-site;
- Local travel costs and subsistence; and
- Venue and equipment hire (if required) and materials production.

These additional items will be for the account of the client or, alternatively, we can provide an all-inclusive quote encompassing all expenses if that is more convenient.

GBRW Learning can also host the course on-site at or near our London headquarters for an all-inclusive fee of US\$ 11,500 including VAT. This includes venue and equipment hire but does NOT include the travel, accommodation and subsistence expenses of participants.

A 60% deposit is payable one-month prior to the scheduled course date, with the balance payable immediately following completion of the course.

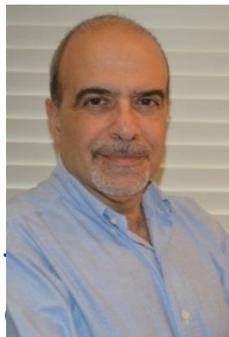
Note: Discounts are available for multiple course bookings of the stand-alone course or other courses within the same programme.

For more information or to arrange a booking, please contact Johnny Rizq at:

johnny.rizq@gbrw.com

Note: Terms and Conditions valid until 31st December 2014

INSTRUCTOR



Johnny Rizq
Director,
GBRW Learning

GBRW Director Johnny Rizq is an experienced strategist, consultant and trainer specialising in banking and financial services in Emerging Markets. An Economics graduate, Johnny's career has included 23 years with the Lloyds Banking Group initially as an economist, later taking senior roles in trade and project finance, strategy and innovation. For many years he headed Lloyds TSB's International Advisory Services unit, providing consulting and training services to banks worldwide.

Johnny's clients have included banks, central banks and governments in the Middle East, Russia, Central and Eastern Europe, Africa, the Far East and the Caribbean. His particular interests are in strategic and business planning, strategy implementation, strategic performance management, culture change, and internal communications. Johnny regularly runs courses and facilitates workshops on Strategy, Change Management, Management Information Reporting, and Strategic Performance Management.

To find out more about Johnny, his credentials, and previous experience, please visit his LinkedIn profile page at:



<http://www.linkedin.com/in/johnnyrizq>

ABOUT GBRW LEARNING

GBRW Learning is the training and knowledge-sharing arm of GBRW Limited. Founded in London in 1995 by a group of senior bankers GBRW's mission is to provide first-class consulting and training to banks and bankers in Emerging Markets, to the same standard as would be expected in developed markets. From our London headquarters and subsidiary offices in Washington DC and Singapore we have served clients in more than 50 countries in Europe, the Middle East, Africa, Asia and the Caribbean. Our clients include banks and other financial institutions, governments, and economic development agencies and institutions.

Through our training programmes we share the experience and knowledge of our experts with bankers in Emerging Markets, supported by high quality materials and taking advantage of the latest technologies. Our courses are all highly inter-active, and make use of carefully designed case studies and simulations.

We offer a range of training topics for banks and financial institutions including:

- Strategy & Management – Formulating, Implementing & Monitoring Strategy
- Risk Management – Credit, Market & Operational Risk
- Human Resources Management
- SME Banking – Customer Relationship Management; Credit Risk Management
- Retail Banking – Customer Relationship Management, Distribution Strategy, Product Management, Credit Risk
- Corporate Banking – Customer Relationship Management, Credit Risk Management
- Governance, Regulation & Compliance
- Financial Markets

For more information, visit our website at:

<http://www.gbrw.com/training>

To discuss your specific requirements email us at:

mail@gbrw.com