

“ *However beautiful the strategy, you should occasionally look at the results.* ”

Winston Churchill

Strategic Management for Banks

Part 3: Monitoring Strategic Performance

OVERVIEW

This course is geared to helping bankers not only develop more successful business strategies but also to execute them more effectively, through the rigorous monitoring and management of performance. It is Part 3 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 to complete the first two parts of this training suite - 'Formulating the Strategy' and 'Implementing the Strategy'. This course specifically focuses on two key aspects of effective Strategic Management:

- 1) What tools and systems do I need to put in place to effectively monitor the ongoing implementation of my strategy, enable the early identification of potential problems and root causes, and support early intervention and swifter remedial action?
- 2) How can I reinforce a strong culture of Strategic Management in my workforce or team through clear linkages between the values and behaviours which underpin the Strategic Plan, particularly through effective staff performance appraisal, and reward and incentivization policies?

WHO SHOULD ATTEND?

This course is aimed at leaders or general managers in commercial banking in particular, especially those in supervisory or executive roles. It is equally relevant for those at Board of Management level, or in functional divisions or departments such as retail, SME or corporate banking, finance, human resources, risk management, IT, operations and others. Strong Strategic Management is important throughout the Bank, so this course is as inclusive as possible. If you are asking yourself any of the following questions, then this course is for you:

- *How can I keep track of progress towards Strategic Objectives, ensure risks are within tolerances, and that the implementation of change remains on track?*
- *How can I improve management reporting, so that it focuses attention on the key strategic issues that need to be addressed?*
- *How can I build a Strategic Management dashboard to convey complex information effectively and quickly?*
- *How can I win the commitment of staff to the Strategy, and ensure that their day-to-day values and behaviours support successful implementation?*

sharing knowledge, developing skills

OUTLINE

OBJECTIVES

Participants in this course will come away with:

- A clear understanding of what constitutes a Strategic Data Warehouse and some clear ideas on how this could be implemented in their own bank
- A vision for the implementation of a rich Strategy Dashboard for their bank
- Practice in data analysis skills, strategic judgment, and decision-making skills
- An understanding of their precise role and responsibilities in the Strategic Management process
- Specific ideas on how to embed improved strategic measures and targets within the performance appraisal process
- An understanding of best practice in reward and incentivisation policies to support successful strategy implementation.

COURSE DELIVERY

- This is a two-day course totaling **14 hours of delivery time**.
- It consists of **six tutorial modules** approximately 1.5 hours each (i.e. a total of 9 hours of instruction).
- A further five 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: DEVELOPING A STRATEGIC DATA WAREHOUSE

- ⇒ The strategic data warehouse: what is it, and how can it fit within our current data architecture?
- ⇒ The pros and cons of different models for storing and distributing data
- ⇒ Finding the data, and implementing practical approaches for data collection and mapping
- ⇒ Approaches to working with imperfect or incomplete data

MODULE 2: BUILDING A STRATEGIC MANAGEMENT DASHBOARD

- ⇒ What is a management dashboard and why is it a good way to present complex data?
- ⇒ KPIs, KRIs, and KSIs: the 3 key strategic data perspectives
- ⇒ Building or buying a cost-effective dashboard and business analytics tool

MODULE 3: EFFECTIVE USE OF STRATEGIC MANAGEMENT INFORMATION

- ⇒ How can the right strategic MI be shared throughout the Bank?
- ⇒ Approaches to interpret the data effectively
- ⇒ Processes to be put in place to make quicker and consistently better evidence-based decisions

MODULE 4: LEADERSHIP, STRATEGY, AND HIGH-PERFORMANCE CULTURE

- ⇒ What are the key elements of a high-performance banking culture?
- ⇒ Demonstrating good strategic management practice as a leader
- ⇒ The role of training and development as a powerful communication tool

MODULE 5: ALIGNING PERSONAL PERFORMANCE MEASURES TO THE STRATEGY

- ⇒ What measures and targets are appropriate for different business units and personnel?
- ⇒ Setting measures and objectives which overlap and are mutually reinforcing
- ⇒ Practical approaches to a healthy performance appraisal process

MODULE 6: EFFECTIVE REWARD FOR STRATEGIC SUCCESS

- ⇒ What keeps good staff at a bank, apart from simply more money?
- ⇒ Designing a bonus system which rewards individual achievement as well as co-operation
- ⇒ Adapting reward policy to the needs of different business units and personnel
- ⇒ Succession planning: developing the next generation of strategic leaders

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 two-day course as described is US\$ 8,800 (eight thousand eight 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\$ 8,800 including VAT. This includes venue and equipment hire but usand eight hundred United States Dollars) 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 Mike Coates at:

michael.coates@gbrw.com

Note: Terms and Conditions valid until 31st December 2014

INSTRUCTOR



Mike Coates
Director,
GBRW Learning

Mike is a director of GBRW Consulting, and a banking professional with more than 16 years' experience. Mike's specialist subjects include strategic management, marketing, and risk management of commercial banks, the management of change, and management information systems. He has worked in over 20 countries through Eastern Europe, the Middle East, Africa, and Asia.

Mike designed this course in response to the challenges banks in emerging markets perceived in effectively implementing strategy, and particularly in embedding the internal tools and systems which reinforce good Strategic Management.

Mike established his reputation as a banking strategy expert with strategy roles with Lloyds Bank (UK) and numerous successful strategy consulting engagements. This practical expertise is combined with an enthusiastic, friendly and participative style which makes for a lively and memorable experience for delegates.

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



<http://www.linkedin.com/in/mikecoates73>

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