

LEADERSHIP & MANAGEMENT | COURSE BROCHURE

Bank Strategy and Transformation: From Vision to Execution

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

This course provides banking professionals with the skills to develop and implement effective strategies for organisational transformation. Participants will learn to align vision with actionable plans, ensuring successful execution in a rapidly evolving financial landscape.

Banking institutions face increasing pressure to adapt to technological advancements, regulatory changes, and evolving customer expectations. Understanding how to create and execute a robust strategy is crucial for maintaining competitiveness and ensuring long-term sustainability. This course addresses the challenges of aligning strategic vision with operational execution, which is vital for success in the banking sector. Participants will explore how to identify strategic opportunities, assess risks, and engage stakeholders effectively, all while navigating the complexities of the modern financial landscape. These skills are essential for driving meaningful transformation in their organisations, enabling them to respond proactively to market dynamics and customer needs.
Participants will engage in practical exercises that simulate real-world scenarios, enabling them to develop actionable strategies tailored to their institutions. By focusing on decision-making, risk assessment, and stakeholder engagement, attendees will enhance their capability to lead transformation initiatives effectively. They will also learn to construct detailed execution plans that include measurable outcomes, ensuring that their strategies translate into tangible results. The course fosters collaboration and critical thinking, equipping participants with the tools necessary to implement successful transformations that meet both organisational goals and customer needs, ultimately fostering a culture of innovation and adaptability.

Professional Problems This Course Is Designed to Solve

- Difficulty translating subject knowledge into practical workplace decisions.
- Inconsistent approaches to the activities covered in the course outline.
- Lack of a structured plan for applying and reviewing new skills.

Course methodology

This course employs a blend of case studies, interactive workshops, and group discussions to facilitate learning. Participants will analyse real-world banking scenarios, allowing them to apply strategic frameworks and tools in practical settings. Exercises will include stakeholder mapping, risk assessment simulations, and execution plan development. Outputs will include strategic plans, risk assessments, and transformation roadmaps, providing tangible evidence of learning and application. By engaging in collaborative activities, participants will enhance their understanding of the complexities involved in banking transformation and develop the confidence to implement their strategies effectively. The hands-on approach ensures that participants leave with practical skills and insights directly applicable to their roles.



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Course objectives

By the end of this course, participants will be able to:
• Analyse current banking trends to identify strategic opportunities and threats.
• Design a comprehensive transformation strategy that aligns with organisational vision.
• Assess stakeholder impact and engagement strategies for successful transformation.
• Prioritise key initiatives based on risk assessment and resource allocation.
• Construct a detailed execution plan with measurable outcomes and timelines.
• Justify strategic decisions using data-driven analysis and forecasting techniques.

Target audience

This course is suitable for:
• Banking executives responsible for strategic planning and transformation initiatives.
• Middle management professionals involved in project execution and operational change.
• Risk management specialists focusing on the implications of strategic decisions.
• Business analysts tasked with evaluating market trends and organisational performance.

Target competencies

Participants will develop competencies in:
• Strategic analysis and opportunity identification in banking.
• Transformation strategy design and implementation.
• Stakeholder engagement and communication skills.
• Risk assessment and management in strategic contexts.
• Data-driven decision making and forecasting.
• Execution planning with measurable outcomes.

Course outline

Day 1: Understanding the Banking Landscape

Applied activity: Participants will analyse a recent case study of a banking institution that successfully navigated transformation. They will identify key trends and challenges faced by the institution and discuss how these influenced strategic decisions and outcomes, focusing on lessons learned.
Output: A summary report highlighting key trends, challenges, and strategic responses identified.

09:00–09:54	Overview of current banking trends and challenges, including fintech disruption and digital banking.



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09:54–10:48	Impact of digital transformation on banking strategies and operations, focusing on technology integration.
10:48–11:00	Regulatory considerations in strategic planning and compliance, including risk management frameworks.
11:00–11:30	**Coffee break**
11:30–12:12	Regulatory considerations in strategic planning and compliance, including risk management frameworks. (continued)
12:12–13:06	Customer expectations and their influence on banking services and products, emphasising service design.
13:06–14:00	Competitive analysis of leading banking institutions and their strategies, identifying best practices.

Day 2: Crafting a Vision and Strategy

Applied activity: In groups, participants will create a vision statement and strategic plan for a fictional bank, considering market trends and customer needs. They will present their strategy to the class for feedback and refinement, focusing on clarity and alignment with organisational goals.
Output: A strategic plan document outlining vision, goals, key initiatives, and stakeholder considerations.

09:00–09:54	Defining organisational vision and mission in the context of banking, ensuring alignment with market needs.
09:54–10:48	Frameworks for developing a strategic plan tailored to banking needs, including SWOT analysis and PESTLE.
10:48–11:00	Aligning strategy with customer needs and market demands through data analysis and customer feedback.
11:00–11:30	**Coffee break**
11:30–12:12	Aligning strategy with customer needs and market demands through data analysis and customer feedback. (continued)
12:12–13:06	Setting measurable goals and objectives for transformation initiatives, ensuring accountability and tracking.
13:06–14:00	Communicating vision and strategy effectively to stakeholders and teams, utilising various communication channels.



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Day 3: Stakeholder Engagement and Risk Assessment

Applied activity: Participants will role-play as stakeholders in a banking transformation scenario, discussing their interests and concerns. They will then develop a stakeholder engagement strategy that addresses these points and ensures alignment with the transformation goals, focusing on communication and trust-building.
Output: A stakeholder engagement strategy document that outlines key stakeholders, their interests, and engagement tactics.

09:00–09:54	Identifying key stakeholders in banking transformation initiatives and their roles, including customers, regulators, and employees.
09:54–10:48	Techniques for effective stakeholder engagement and communication strategies, ensuring buy-in and support.
10:48–11:00	Risk assessment methodologies for evaluating strategic initiatives in banking, including qualitative and quantitative approaches.
11:00–11:30	**Coffee break**
11:30–12:12	Risk assessment methodologies for evaluating strategic initiatives in banking, including qualitative and quantitative approaches. (continued)
12:12–13:06	Balancing stakeholder interests with organisational goals and objectives, using negotiation and conflict resolution techniques.
13:06–14:00	Developing a comprehensive communication plan for engaging stakeholders throughout the transformation process, ensuring transparency.

Day 4: Execution Planning and Resource Allocation

Applied activity: Participants will develop an execution plan for a selected initiative from their strategic plan, detailing timelines, resources, and key performance indicators. They will present their plans to peers for critique and suggestions, focusing on feasibility and impact.
Output: An execution plan with timelines, resource allocations, and performance metrics.

09:00–09:54	Creating an execution roadmap for transformation initiatives in banking, detailing phases and milestones.
09:54–10:48	Resource allocation strategies for effective project management in banking, including budgeting and personnel assignment.
10:48–11:00	Monitoring and evaluating progress against strategic goals and objectives, using KPIs and performance metrics.



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11:00–11:30	**Coffee break**
11:30–12:12	Monitoring and evaluating progress against strategic goals and objectives, using KPIs and performance metrics. (continued)
12:12–13:06	Adjusting plans based on performance metrics and feedback from stakeholders, ensuring agility in execution.
13:06–14:00	Best practices for project management in banking transformation initiatives, including agile methodologies and change management.

Day 5: Integrated Strategy Execution Simulation

Applied activity: In a simulated environment, participants will implement their execution plans, responding to challenges and making real-time adjustments. They will present their outcomes and lessons learned to the group, focusing on strategy effectiveness and adaptability, and discussing potential improvements.
Output: A comprehensive report detailing the simulation outcomes, strategic adjustments made, and insights gained.

09:00–09:54	Integrating strategy and execution in a banking context through simulation, focusing on real-time decision-making.
09:54–10:48	Simulating real-world challenges in banking transformation and decision-making, including unexpected regulatory changes.
10:48–11:00	Evaluating the effectiveness of strategic initiatives through feedback and analysis, ensuring continuous improvement.
11:00–11:30	**Coffee break**
11:30–12:12	Evaluating the effectiveness of strategic initiatives through feedback and analysis, ensuring continuous improvement. (continued)
12:12–13:06	Adjusting strategies based on simulated outcomes and stakeholder reactions, fostering adaptability.
13:06–14:00	Final presentations and peer feedback on strategies and execution plans, promoting collaborative learning.

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.



Course content

Dates, venues and fees

Current published course plans. Fees are per participant in EUR, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (EUR)
Dubai Confirmed dates	9 Nov 2026	13 Nov 2026	**€3,150.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**€1,250.–**
Vienna Confirmed dates	16 Nov 2026	20 Nov 2026	**€2,940.–**
Online Confirmed dates	16 Nov 2026	20 Nov 2026	**€1,250.–**
Frankfurt Confirmed dates	23 Nov 2026	27 Nov 2026	**€2,650.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**€1,250.–**
Kuala Lumpur Confirmed dates	7 Dec 2026	11 Dec 2026	**€1,450.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**€1,250.–**
Paris Confirmed dates	14 Dec 2026	18 Dec 2026	**€2,860.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**€1,250.-**
Istanbul Confirmed dates	11 Jan 2027	15 Jan 2027	**€2,650.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**€1,250.-**
Amsterdam Confirmed dates	25 Jan 2027	29 Jan 2027	**€2,540.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**€1,250.-**
Singapore Confirmed dates	8 Feb 2027	12 Feb 2027	**€2,820.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**€1,250.-**
Cape Town Confirmed dates	15 Feb 2027	19 Feb 2027	**€1,890.-**
Online Confirmed dates	15 Feb 2027	19 Feb 2027	**€1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
London Confirmed dates	22 Feb 2027	26 Feb 2027	**€2,450.-**
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**€1,250.-**
Dubai Confirmed dates	8 Mar 2027	12 Mar 2027	**€3,150.-**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**€1,250.-**
Frankfurt Confirmed dates	22 Mar 2027	26 Mar 2027	**€2,650.-**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**€1,250.-**
Barcelona Confirmed dates	5 Apr 2027	9 Apr 2027	**€2,840.-**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**€1,250.-**
Kuala Lumpur Confirmed dates	12 Apr 2027	16 Apr 2027	**€1,450.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**€1,250.-**
Paris Confirmed dates	26 Apr 2027	30 Apr 2027	**€2,860.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**€1,250.-**
Istanbul Confirmed dates	10 May 2027	14 May 2027	**€2,650.-**
Online Confirmed dates	10 May 2027	14 May 2027	**€1,250.-**
Amsterdam Confirmed dates	24 May 2027	28 May 2027	**€2,540.-**
Online Confirmed dates	24 May 2027	28 May 2027	**€1,250.-**
Rome Confirmed dates	7 Jun 2027	11 Jun 2027	**€2,450.-**
Online Confirmed dates	7 Jun 2027	11 Jun 2027	**€1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Singapore Confirmed dates	14 Jun 2027	18 Jun 2027	**€2,820.-**
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**€1,250.-**
London Confirmed dates	21 Jun 2027	25 Jun 2027	**€2,450.-**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**€1,250.-**
Dubai Confirmed dates	12 Jul 2027	16 Jul 2027	**€3,150.-**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**€1,250.-**
Frankfurt Confirmed dates	26 Jul 2027	30 Jul 2027	**€2,650.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**€1,250.-**
Kuala Lumpur Confirmed dates	9 Aug 2027	13 Aug 2027	**€1,450.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**€1,250.-**
Rome Confirmed dates	16 Aug 2027	20 Aug 2027	**€2,450.-**
Online Confirmed dates	16 Aug 2027	20 Aug 2027	**€1,250.-**
Paris Confirmed dates	23 Aug 2027	27 Aug 2027	**€2,860.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**€1,250.-**
Istanbul Confirmed dates	13 Sept 2027	17 Sept 2027	**€2,650.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**€1,250.-**
Amsterdam Confirmed dates	20 Sept 2027	24 Sept 2027	**€2,540.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**€1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Cape Town Confirmed dates	4 Oct 2027	8 Oct 2027	**€1,890.-**
Online Confirmed dates	4 Oct 2027	8 Oct 2027	**€1,250.-**
Singapore Confirmed dates	11 Oct 2027	15 Oct 2027	**€2,820.-**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**€1,250.-**
London Confirmed dates	25 Oct 2027	29 Oct 2027	**€2,450.-**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**€1,250.-**
Dubai Confirmed dates	8 Nov 2027	12 Nov 2027	**€3,150.-**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**€1,250.-**
Frankfurt Confirmed dates	22 Nov 2027	26 Nov 2027	**€2,650.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**€1,250.-**
Kuala Lumpur Confirmed dates	6 Dec 2027	10 Dec 2027	**€1,450.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**€1,250.-**
Paris Confirmed dates	13 Dec 2027	17 Dec 2027	**€2,860.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**€1,250.-**

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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