

Solving Project Challenges for the Retail Banking Industry



TwentyEighty Strategy Execution has been delivering an extensive suite of customized project management training to the world's leading financial services organizations for over 35 years. We have assisted clients across all sectors of the financial services industry in improving efficiency, project success and their bottom line through our broad delivery of training modalities and curricula.

Our solutions combine the best of cutting-edge university research and best practice business techniques to ensure adoption, to deliver performance improvement and to validate investment in talent development. Whether your goal is to sharpen your team's project-focused skills or evolve the way your leadership approaches strategic execution, we have the solutions that will transform the way you think, lead, execute—and perform project-based work.

It is no coincidence that the largest financial services organizations in the world use our services. Trust TwentyEighty Strategy Execution to do the same for you.

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FROM STRATEGY TO EXECUTION

SOLVING PROJECT CHALLENGES FOR THE **RETAIL BANKING** INDUSTRY



Industry Drivers and their Impact on Project Performance

While every organization has their unique business challenges, TwentyEighty Strategy Execution’s extensive research and practical work with leading banks has allowed us to aggregate these business issues into four definitive drivers that distinguish the industry today. As we put on our specialist, project-tinted lenses in working with the industry, these drivers have been determined to critically impact the skills requirements and competencies development of the project community. Our clients have thus realized the most significant value against these business drivers by focusing on the select project performance areas.



SHIFTING REVENUE AND DISTRIBUTION MODELS

Improving the overall customer experience is a priority for most banks. The product-focused approach, much favored by banks previously, is giving way to customer-centric models which deliver multi-channel access, product simplicity and seamless integration across service lines. To provide customers with the convenience and personalization expected, banks will need the capability to analyze internal and external sources of data and deliver relevant solutions at the time and point of need. The traditional branch model will give way to new distribution channels as banks experiment with a mix of assisted self-service, in-store branches and full service centers. To succeed in such a dynamic environment, banks will need to fearlessly explore and adapt to new approaches, alliances and solutions.



RISK, REGULATION AND COMPLIANCE

The growing complexity of industry regulations coupled with less flexibility to meet compliance requirements is causing a massive shift of IT and project resources within financial services. Rather than focusing on building systems to support new innovative approaches to the business, valuable resources are diverted toward time sensitive, high-consequence compliance projects. As banks increasingly take a more proactive approach to compliance, they will begin to incorporate compliance risk management into every project and tighten their resource management processes.



COST EFFICIENT OPERATIONS

Managing costs while supporting growth in a tightened risk management environment is a big challenge to financial institutions and requires robust systems and efficient operations to succeed. In order to create a sustainable business advantage, banks will require a well-defined IT strategy supported by strong project portfolio processes to optimize IT operations and infrastructure investments. Additionally, the IT organization will need to beef up their sourcing and off-shore management capabilities in order to successfully develop more flexible business operations systems while effectively managing costs.



HUMAN CAPITAL PRODUCTIVITY

The re-allocation of resources to meet regulatory requirements coupled with cost efficiency measures to offset reduced revenue have left many banks under-equipped to deliver on growth expectations. In this environment, it is critical to maximize the productivity of existing talent through thoughtful human capital development. A recent TwentyEighty Strategy Execution salary and development survey revealed that project management training initiatives generated an average ROI of 268% across industries. Given the size and complexity of projects inherent to the banking industry and the impact of cost overruns, the estimate is conservative and actual ROI for banks will likely fare even better.

OUR SOLUTION

Banks need agile product and technology development to bring new products and capabilities to market much quicker than the current pace. This requires continual iteration, real life pilot testing and rapid learning from customers. However, effective agile project management requires organizational commitment and focus. Over the years, TwentyEighty Strategy Execution has assisted clients through the process of shifting to agile project management and provided them with both the organizational and individual capabilities required to successfully implement and maintain agile methods. Core focus areas include:

- Achieving Organizational Buy-in for Agile
- SCRUM
- Estimating and Planning Agile Projects
- Agile Requirements
- Risk Management in Agile Environments

OUR SOLUTION

Banks need to establish strong risk management and resource management processes within their project environments if they are to successfully manage the complications that arise from compliance initiatives. TwentyEighty Strategy Execution helps build these capabilities in our clients by providing content and services around the following focus areas:

- Eliciting and Documenting Risks
- Risk Analysis
- Risk Monitoring and Control
- Response Planning
- Scheduling Techniques
- Schedule Analysis
- Resource Management
- Project Leadership Development

OUR SOLUTION

TwentyEighty Strategy Execution has been helping organizations manage their IT strategy through the development of effective project portfolio management capabilities. From portfolio analysis to project prioritization and selection, we provide learning solutions to keep organizational objectives aligned to operational capability. Additionally, we have an extensive sourcing and contracting curriculum focused on building consistent organizational capabilities to manage the entire procurement process from vendor requirements through contract close out.

- Portfolio Risk Management
- Portfolio Budgeting and Resource Allocation
- Portfolio Monitoring and Control
- Project Leadership Development
- Vendor Requirements
- Proposal Evaluation
- Contract Negotiation
- Contract Monitoring

OUR SOLUTION

Our singular focus is to help our clients build project-focused competencies. After three decades of working with project organizations in the world’s largest enterprises, we are capable of enabling clients to build organizational excellence in the following areas:

- Project, Program and Portfolio Management
- Sourcing and Contract Management
- Requirements Management
- Project Leadership Development
- Business Analysis



Banking to Success

The pace of change in the competitive world of retail banking is accelerating all around the world. Every bank is in the race to win more customers and more business in a landscape of savvy consumers, tight compliance oversight and intense competition. Numerous critical issues facing financial institutions today are affecting all levels of their organization. As the industry continues to address regulatory reforms, complex reporting requirements, implementation of cost-effective technologies, stakeholder scrutiny, talent acquisition and retention; a new strategic roadmap is necessary to ride the waves of change and seize the opportunities that will lay the foundation for a bright future.

A key to overcoming these challenges and building a strong competitive advantage is to find an informed perspective that can help organizations swiftly respond to change and best position themselves to win in the marketplace. This is where we can help. We have been partnering with organizations around the world to address their most pressing business issues. Our portfolio of clients covers the depth and breadth of the industry ranging from global banking giants to regional financial services companies.

Proving Business Value for Your Learning Investments

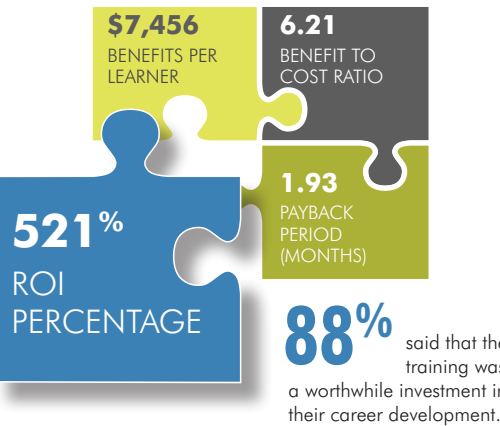
At TwentyEighty Strategy Execution, we know that learning investments must be linked to improved business performance. We asked 15,943 learners from the banking and finance industry who have trained with us since 2010 to rate how their training in project-related areas has impacted their business performance. And the numbers speak for themselves.

STRONG BUSINESS IMPACT FROM PROJECT RELATED TRAINING

Client professionals from the banking and finance industry were asked to identify the business impact they had delivered back to the organization for their participation in our training events.

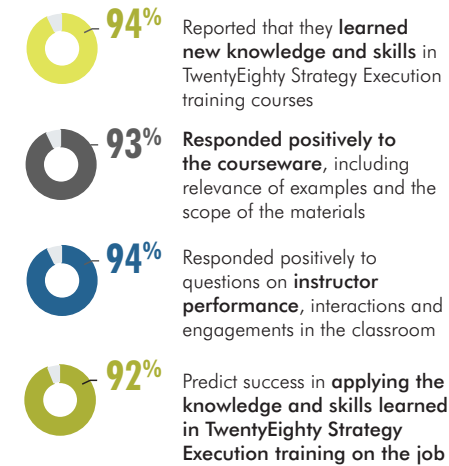


OUTSTANDING TRAINING ROI



The above refers to some standard financial return on investment calculations based on a learner predicted 8.48% improvement in job performance (adjusted for self-reported bias), a per student tuition cost of \$1,200, and an average project or contract manager salary of \$80,000. These results are based on information gathered immediately following their participation in a TwentyEighty Strategy Execution training event.

IMPROVED PERFORMANCE QUALITY AND EFFECTIVENESS



ACCELERATED PERFORMANCE IMPROVEMENT

