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COURSE BROCHURE

Bank Business Unit Planning and Scorecards Training Course

26 – 30 July 2027
New York

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Bank Business Unit Planning and Scorecards Training Course

Ref: 2268_84323 **Date:** 26 – 30 July 2027 **Location:** New York **Fees:** 7900 GBP

Bank Business Unit Planning and Scorecards is a 1-week training course for bank managers and strategy staff who build the annual plan of a retail, corporate or treasury unit, ending with a Business Unit Strategy Plan and Scorecard. Banks now judge each unit by its return on allocated capital, so unit leaders must turn group ambitions into targets they can defend and track. This course is run by Jupiter Prime Training.

Why Bank Business Unit Planning and Scorecards Matters Now

Three forces press on unit planning in banks today. Digital competitors attack the most profitable products first. Capital and liquidity rules make every growth target carry a balance sheet cost. Investors and executive committees expect targets cascaded from group strategy into measures each unit head owns. A unit that plans well wins resources and keeps them; one that plans badly faces cuts and reforecasting. The course rests on strategy maps, driver trees and risk-adjusted return measures, explained in general terms.

Who Gains Most from Bank Business Unit Planning and Scorecards

- Managers responsible for the annual plan and targets of a retail, corporate, private or treasury unit
- Strategy and planning staff who cascade group ambitions into unit objectives
- Finance business partners who build unit revenue, cost and capital forecasts
- Performance staff who design and report unit measures to the executive committee
- Product and segment heads whose offers carry the unit's growth targets

A unit leadership group that sends its head, finance partner and planning lead together gains most.

Bank Business Unit Planning and Scorecards Capabilities

Participants move from the group's stated ambition to a unit plan that names its markets, its earnings drivers and the measures that will show whether it is working.

- Assess the unit's market position against peers and digital entrants — the case for where to compete
- Build a revenue and cost driver tree for the unit — the executive committee's target discussion
- Calculate risk-adjusted return on allocated capital by segment — the allocation of balance sheet
- Design a strategy map and scorecard of leading and lagging measures — the unit head's monthly review
- Specify initiatives with owners, milestones and expected value — the investment committee's funding choice
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Communicate the plan and its trade-offs to the board and front-line teams — buy-in across the unit

Key Bank Business Unit Planning and Scorecards Terms

- Business unit — a part of the bank with its own clients, products, earnings and allocated capital, run by an accountable head.
- Driver tree — a breakdown of a unit's profit into the volumes, margins, fees and costs that produce it.
- Risk-adjusted return on capital — unit earnings after expected losses, divided by the capital allocated to cover its risks.
- Strategy map — a one-page chart linking unit objectives across financial, client, process and capability views.
- Leading indicator — a measure that moves before results do, such as pipeline value or digital activation rate.
- Target cascade — the process of splitting group targets into unit, team and individual objectives that add up.

Bank Business Unit Planning and Scorecards Day by Day

Day 1: The Unit in Its Market

- Group Ambition Statement — What the Unit Must Contribute
- Client Segment and Product Mapping — Where the Unit Earns Today
- Peer and Digital Entrant Comparison — Threats to Margin and Fee Income
- Value Proposition Canvas — Reasons Clients Choose This Bank
- Strategic Choice Cascade — Where to Play and How to Win

Day 2: Earnings Drivers and Capital

- Net Interest Margin Driver Tree — Volume, Spread and Mix Decisions
- Fee Income Levers — Pricing and Cross-Sell Priorities
- Cost-to-Serve Analysis by Channel — Branch, Digital and Relationship Coverage
- Capital Allocation by Segment — Which Growth the Balance Sheet Can Carry
- Risk-Adjusted Return Ranking — Grow, Fix or Exit Choices

Day 3: Targets and the Scorecard

- Strategy Map Construction — Linking Objectives Across Four Views
- Leading and Lagging Measure Selection — Early Warning for Unit Heads
- Target Setting from Baselines and Peers — Stretch Versus Credibility
- Target Cascade to Teams — Ownership Below the Unit Head
- Scorecard Layout and Thresholds — What Triggers Escalation

Day 4: Initiatives and Execution Tracking

- Initiative Charter Template — Scope, Owner and Expected Value
- Portfolio Prioritisation Matrix — Funding Under a Fixed Budget
- Milestone and Benefit Tracking Log — Early Sight of Slippage
- Monthly Performance Dialogue — Turning Variances into Actions
- Reforecast and Rolling Plan Rules — When to Reset Targets

Day 5: Practising the Business Unit Strategy Plan and Scorecard

- Market Position Summary — Applying the Day 1 Choice Cascade
- Earnings and Capital Case — Applying the Day 2 Return Ranking
- Unit Scorecard Draft — Applying the Day 3 Strategy Map
- Board Presentation Rehearsal — Defending Trade-Offs Under Challenge
- Business Unit Strategy Plan and Scorecard — Final Unit Commitments

Applying Bank Business Unit Planning and Scorecards After the Course

- Lead a driver tree session with the unit's finance partner to rebuild next year's revenue and cost targets from volumes, spreads and fees.
- Run the first monthly performance dialogue on the new scorecard, agreeing actions for every measure outside its threshold.

Bank Business Unit Planning and Scorecards Questions FAQ

What is bank business unit planning and scorecards, and why does it matter now?

It is the discipline of turning group strategy into a unit plan with earnings drivers, capital needs and tracked measures. It matters now because digital rivals, capital costs and executive scrutiny leave little room for unit plans built only on last year's numbers.

Which roles gain most from bank business unit planning and scorecards?

Unit heads, strategy and planning staff, finance business partners and performance reporting staff gain most. You benefit most if you own a unit's targets.

How does bank business unit planning and scorecards differ from a bank strategy and operations course?

It works at the level of one unit rather than the whole bank. Instead of enterprise strategy and operating models, you build a unit's driver tree, capital case, scorecard and initiative tracking.

What do you bring back from bank business unit planning and scorecards?

You bring back a drafted unit plan with its market position, earnings and capital case, scorecard and initiatives.

Bank Business Unit Planning and Scorecards: The Way Forward

The Business Unit Strategy Plan and Scorecard first informs the target discussion with the executive committee, where growth must be matched to allocated capital. Unit heads, finance partners and planning leads use it each month to steer initiatives. After the first quarter, leading indicators that failed to predict results deserve replacing before the next cycle.