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COURSE BROCHURE

# Bank Strategy Execution and Initiative Portfolio Training Course

4 – 8 October 2027
Madrid

# Bank Strategy Execution and Initiative Portfolio Training Course

**Ref:** 2330_87082 **Date:** 4 – 8 October 2027 **Location:** Madrid **Fees:** 5600 GBP

Bank Strategy Execution and Initiative Portfolio is a 1-week training course for bank strategy and transformation office staff who turn a board-approved vision into funded initiatives, and it builds a bank transformation roadmap. Banks now carry more parallel initiatives than their change capacity can absorb, so sequencing and benefit discipline decide whether strategy shows up in results. Jupiter Prime Training links bank strategy execution and initiative portfolio choices to measurable outcomes.

## Why Bank Strategy Execution and Initiative Portfolio Matters Now

Three groups shape this work today. Boards and shareholders want strategic ambitions translated into return on equity, cost-to-income and customer metrics they can track each quarter. Business lines compete for the same scarce technology, data and risk specialists, so every new initiative crowds out another. Supervisors and auditors expect large change to carry clear accountability, dependency control and risk sign-off. A disciplined bank releases funding from stalled initiatives quickly; an undisciplined one collects half-finished projects and a strategy that lives on slides.

## Who Gains Most from Bank Strategy Execution and Initiative Portfolio

- Staff who translate strategic themes into initiative charters and targets
- Analysts who maintain the initiative portfolio, dependencies and funding stage gates
- Officers who track benefits and reconcile them with finance figures
- Business line coordinators who represent retail, corporate or treasury priorities in portfolio forums
- Staff who prepare executive committee packs on transformation progress

A strategy office and its partner finance team gain most when several members attend together and leave with one shared portfolio language.

## Bank Strategy Execution and Initiative Portfolio Capabilities

Participants move from strategic statements to a sequenced, funded and tracked set of bank initiatives.

- Translate a bank vision into strategic themes, target metrics and initiative charters — the executive committee
- Score and rank initiatives by value, risk and capacity use — portfolio funding forums
- Design an operating model shift across channels, hubs and shared services — business line heads
- Build a benefits register tied to the finance ledger — the chief financial officer
- Set an execution cadence of reviews, stage gates and escalation — the transformation sponsor
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Communicate portfolio trade-offs with clear stop, slow or accelerate options — the board

## Key Bank Strategy Execution and Initiative Portfolio Terms

- Strategic theme — a broad ambition that groups related initiatives under one target.
- Initiative charter — a short document stating an initiative's scope, owner, cost, benefits and dependencies.
- Stage gate — a funding checkpoint where an initiative must show evidence before releasing its next tranche.
- Benefits register — a list of expected financial and customer benefits, each with an owner, starting value and target date.
- Change capacity — the volume of change that staff, technology and risk functions can absorb at once.
- Target operating model — the intended future arrangement of a bank's processes, locations, people and platforms.

## Bank Strategy Execution and Initiative Portfolio Day by Day

### Day 1: Bank Vision and Strategic Themes

- Vision Statements Versus Measurable Ambitions — Choosing Metrics the Board Will Track
- Profit Pool and Segment Review — Where the Bank Chooses to Grow
- Strategic Theme Tree — Linking Ambitions to Initiative Families
- Competitor and Fintech Moves — Testing Assumptions Behind the Strategy
- Risk Appetite Links — Keeping Strategic Targets Within Agreed Limits

### Day 2: Building the Initiative Portfolio

- Initiative Charter Template — Defining Scope, Owner, Cost and Benefit Logic
- Value, Risk and Effort Scoring — Ranking Competing Business Line Requests
- Dependency Mapping Across Initiatives — Avoiding Clashes on Shared Platforms
- Change Capacity Heatmap — Matching Initiative Load to Specialist Availability
- Stop, Slow or Accelerate Choices — Rebalancing the Portfolio Each Quarter

### Day 3: Operating Model Change

- Current and Target Operating Model Canvas — Locating the Biggest Gaps
- Branch, Hub and Digital Channel Mix — Deciding Where Work Happens
- Shared Service and Outsourcing Options — Weighing Control Against Cost
- Organisation Design Moves — Spans, Layers and Decision Rights
- Transition States and Sequencing — Moving Without Disrupting Customers

## Day 4: Benefits Tracking and Execution Cadence

- Benefits Register and Starting Values — Proving Gains in Finance Terms
- Leading and Lagging Indicators — Spotting Slippage Before Quarter End
- Stage Gate Funding Reviews — Releasing or Holding the Next Tranche
- Monthly Portfolio Forum Rhythm — Escalating Blockers to the Right Level
- Executive Committee Dashboard — Showing Progress Without Status Theatre

## Day 5: Practising the Bank Transformation Roadmap

- Case Bank Theme Tree and Charters — Applying Vision Translation Methods
- Case Portfolio Scoring and Capacity Check — Applying Ranking Methods
- Case Operating Model Transition Plan — Applying Sequencing Choices
- Peer Challenge of Benefits and Cadence — Testing Credibility Before Approval
- Bank Transformation Roadmap — Completing the Participant's Own Version

## Applying Bank Strategy Execution and Initiative Portfolio After the Course

- Rescore the current initiative list on value, risk and capacity use and bring the first stop, slow or accelerate proposal to the next portfolio forum.
- Rebuild the benefits register for the three largest initiatives, agreeing starting values and owners with finance.

## Bank Strategy Execution and Initiative Portfolio Questions FAQ

### What is bank strategy execution and initiative portfolio work, and why does it matter now?

It is the discipline of turning a bank's strategy into a ranked, funded and tracked set of initiatives. Scarce specialists and board pressure for returns make sequencing decisive.

### Which roles gain most from bank strategy execution and initiative portfolio training?

Strategy and transformation office staff gain most, together with portfolio analysts, benefits officers, business line coordinators and those who prepare executive committee packs.

### How does bank strategy execution and initiative portfolio differ from a digital banking or change leadership course?

It focuses on choosing, sequencing and funding initiatives across the whole bank. A digital banking course looks at channels and platforms; a change leadership course looks at people and adoption. Here you practise portfolio scoring, stage gates and benefits tracking.

## What do you bring back from bank strategy execution and initiative portfolio training?

You bring back a roadmap linking strategic themes, ranked initiatives, operating model steps and a benefits register.

## Bank Strategy Execution and Initiative Portfolio: The Way Forward

The bank transformation roadmap first informs which initiatives receive the next funding tranche and which pause. Strategy office staff, finance partners and business line heads use it in every portfolio forum. After its first quarter, revisit the capacity assumptions and benefit starting values, as both drift once initiatives meet real conditions.