

COURSE SUMMARY CHART

Who takes which course?

Who Attends/Course	Fundamentals of Commercial Banking	Understanding Change	Sales, Service and Relationship Management in Financial Institutions	Fundamentals of Trade Finance	Analysis Course ✓ Financial Analysis ✓ Credit Analysis ✓ Business Analysis	Financial Analysis for Credit Restructure	High Networth and Investment Course	Soft Skills ✓ Executive Presence ✓ Emotional Confidence ✓ Effective Networking	Managing Change	The Board Course
All Staff										
Corporate/SME/Commercial/Credit/Legal/Trade Finance/Treasury/Branch Managers										
Middle Managers and High Potentials on fast track to leadership										
Board Members, Company Secretary, Internal Auditor										

- See Courses Outline below
 - Page 2- Foundational Courses
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 - Page 4- Leadership Courses
- Detailed Course brochures for each course sent separately

FOUNDATIONAL			
No.	Course	Learning Outcomes	Learning Units
1	Fundamentals of Commercial Banking	Foundation Programme that helps a delegate understand the intermediation and the foundational aspects of commercial banking, separating it from other types of Banks as well as demonstrating how Bank mobilise deposit to create risk assets and Revenue.	<ul style="list-style-type: none"> ✓ Inflation, Exchange Rates and other Macroeconomic indices ✓ RBA, CAMEL-S, FIA and Regulation of Banks ✓ Reputation, Liquidity, Compliance and other risks ✓ Anti-Money Laundering legislation and “KYC” rules ✓ Intermediation and how deposits fund lending to create spread ✓ Interbank, Correspondence and International banking ✓ Reconciliation, transactions and operations support ✓ International standards in Banking ✓ Accuracy, error detection and fraud control ✓ Lending, Deposit and Contingent bank products ✓ Interest, Trading, Fees and other revenues ✓ Operational and other costs of doing business ✓ Provisioning and other sources of revenue loss ✓ Bank Capital classification and implications
2	Sales, Service and Relationship Management in Financial Institutions	Learning the general sales psychology and how to practically apply it in the regulated financial services sector, in practical ways that result into Deposit mobilization, Risk Asset creation, Revenue generation, customer Attraction and Retention.	<ul style="list-style-type: none"> ✓ Sales, Marketing and RM ✓ OTC, Cross Sale and the Value Chain ✓ Selling in Disruption, Regulation and Risk ✓ Sales Process ✓ Customer Lifetime Value ✓ Management of problem relationships ✓ Service as the glue between sales and RM ✓ Service as a psychology ✓ Net Promoter Scoring (internal and external) ✓ CRM and Technology as a driver of SSRM
3	High Networth and Investment Course	Equipping Bank staff with Investment knowledge to enable them engage high net worth and affluent individuals with relevant solutions, to retain attract as well as maximize Deposit, Risk Assets and Revenue.	<ul style="list-style-type: none"> ✓ Private Banking/ Wealth Management (product differentiation) and Executive Banking (Service differentiation) ✓ Commercial Vs. Investment products ✓ Product-driven Account Management Skills required in the HNWI suite ✓ Cash, Near cash, Treasury Bills and Money markets ✓ Bonds, Equities and Alternatives ✓ Units Trusts and Insurance products ✓ Cross sale with Treasury, Corporate, SME and Retail ✓ KYC, Money Laundering and other Financial Crime ✓ Fiduciary and Conflict of Interest

TECHNICAL DEPTH			
No.	Course	Learning Outcomes	Learning Units
1	Fundamentals of Trade Finance	<p>Understanding how Trade Finance instruments work and how to structure them into solutions to customer problems, in ways that result into</p> <ul style="list-style-type: none"> ➤ Deposit mobilization ➤ Risk Asset creation ➤ Revenue generation ➤ Attraction and Retention of Bank customers. 	<ul style="list-style-type: none"> ✓ Trade Finance Principles ✓ Documentary and Clean Collections ✓ Letters of Credit (LCs) ✓ Guarantees and Indemnities ✓ Standby Letters of Credit ✓ Discounting, Factoring and Forfaiting ✓ Structured Finance ✓ Value Chain Banking
2	Comprehensive Analysis Course <ul style="list-style-type: none"> ➤ Financial Analysis ➤ Credit Analysis ➤ Business Analysis 	<p>The all-in tool kit to empower business development, credit risk and legal officers with analytical tools to assess the business case while identifying and mitigating underlying risks in a transaction, structuring credit in ways that maximize Deposit, Risk Assets, Revenue generation as well as client attraction and retention.</p>	<ul style="list-style-type: none"> ✓ Business Analysis: Macroeconomic environment; Industry/ Sector; Business Model; Trade and Cash Conversion ✓ Financial Analysis- Balance sheet, Profit/Loss Statement; Cashflow Statement; Ratios ✓ Credit Analysis: Willingness; Ability; Collateral; Pricing; Policy; Others ✓ Analysis of SMEs with poor or no financial statements and inference based analysis
3	Financial Analysis for Credit Restructure	<p>Responding to the anticipated impact of the COVID 19 Pandemic over the next five years, this course is a review of the Comprehensive analysis course, with strong emphasis on management of delinquency and minimizing impact of loan loss provisions arising from unexpected adverse developments in the market.</p>	<ul style="list-style-type: none"> ✓ Restructure and Foreclosure options ✓ Measuring macroeconomic impact- Interest Rates, Inflation and Exchange Rates ✓ FIA and Bank of Uganda Guidelines and Credit Relief Measures ✓ Sector-specific post disruption PESTEL and SWOT analyses ✓ Interim review of Balance Sheet, Profit/Loss and Cashflow sensitization of internal and alternative sources of cash ✓ Reduction and/or Waiver of Interest, Moratorium and Tenor ✓ Support to access more concessional facility .e.g. UDBL, ACF etc ✓ Post disruption collateral adequacy review ✓ Impact of facilities with other lenders

LEADERSHIP			
No.	Course	Learning Outcomes	Learning Units
1	The Change Programme	(i) Understanding Change	<ul style="list-style-type: none"> ✓ Change and Transition ✓ Types of Change ✓ Stakeholder Management in Change ✓ Change Psychology ✓ Stages of Change ✓ Options to change- Adapt/Resist/Others
		(ii) Managing Change	<ul style="list-style-type: none"> ✓ Understanding Change in (i) above ✓ Change Strategy ✓ Change Workshop
2	Soft Skills for Middle Managers and High Potential Employees	Bridging the gap between merit and professional success, this course supports personal growth of middle managers and high potential officers on leadership fast track, by strengthening their non-technical skills, turning them into all-round people-centric cross functional operators.	<ul style="list-style-type: none"> ✓ How do Technical differ from Soft Skills ✓ Applying soft skills to create TRUST <ul style="list-style-type: none"> ➤ Executive Presence-Appearance, Communication, Behavior ➤ Emotional Intelligence/ Confidence ➤ Effective Networking
3	The Board Course	<p>Supporting Board Members to deliver their oversight role, managing the balance between the hands-off oversight and the regulatory requirement for close scrutiny.</p> <p>This and the Fundamentals of Commercial Banking Course are the ideal package for your board members.</p>	<ul style="list-style-type: none"> ✓ The evolving role of the Board in Bank sustainability ✓ FIA and the unique role of a Board Member in a Financial Institution ✓ Understanding Financial Statements ✓ Institutional and Private Equity Investors ✓ CSR and Socially Responsible Investment. ✓ Board Behavior, Evaluation, Financial Stewardship and Remuneration ✓ Board Committees: Risk, Credit, Finance, Compensation, Audit, others ✓ Sharia Advisory Board-Islamic Banking ✓ Role of the company secretary ✓ Relationship with Chief Internal Auditor

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