



اتحاد شركات الاستثمار
UNION OF INVESTMENT COMPANIES

PMP for Banking and Financial Services

Investment Studies Center (ISC) @ Union of Investment Companies, is delighted to invite you to a training program to equip participants with the necessary project management knowledge and skills specific to the financial services and banking sector, according to the following details:

يسر مركز دراسات الاستثمار لدى اتحاد شركات الاستثمار الإعلان عن تنظيم برنامج تدريبي لتزويد المشاركين بالمعرفة والمهارات اللازمة لإدارة المشاريع الخاصة بالخدمات المالية والقطاع المصرفي، وذلك وفقاً للتفاصيل التالية:

Training Program: PMP for Banking and Financial Services البرنامج التدريبي:

Instructor: Dr. Arezou Harraf المحاضر:

Dates: (Tuesday - Thursday), 29th – 31st October 2024 (3 Days) التاريخ:

Timing: 09:00AM - 02:00PM الوقت:

Language: English لغة البرنامج:

Venue: In person @ UIC premises المكان:

Course Details, Registration & Fees in link below تفاصيل البرنامج، التسجيل والرسوم في الرابط أدناه

<http://unioninvest.org/upcomingevents.aspx>

Registration is open according to availability

Discounted Fees for UIC Members KWD 250 الرسوم بعد الخصم لأعضاء الاتحاد

Non-Members KWD 300 غير أعضاء الاتحاد



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PMP for Banking and Financial Services

Introduction:

This intensive three-day training program is designed to equip participants with the necessary project management knowledge and skills specific to the financial services and banking sector, enabling them to effectively plan, execute, and monitor projects in this industry, ultimately leading to successful project outcomes.

Outline:

Day 1: Project Management Fundamentals in Financial Services and Banking

Module 1: Introduction to Project Management in Financial Services

- ❖ Overview of project management principles
 - Definition of a project
 - Project life cycle
 - Project management processes
- ❖ Key differences and challenges in financial services and banking projects
 - Regulatory constraints
 - Complex stakeholder landscape
 - Risk management in a volatile market

Hands-on Activity: Case study analysis of a banking project, identifying unique challenges and potential solutions. Participants will work in groups to analyze a real-world banking project case study, highlighting specific project management challenges and proposing effective solutions.

Module 2: Project Scope Management

- ❖ Defining project scope in financial services projects
 - Stakeholder identification and analysis
 - Requirements gathering techniques
- ❖ Scope verification and control techniques
 - Work breakdown structure (WBS)
 - Scope change management

Hands-on Activity: Group exercise to develop a project scope statement for a financial services project, followed by peer review and feedback. Participants will collaborate to create a comprehensive project scope statement, ensuring alignment with stakeholder expectations and project objectives.

Module 3: Project Time Management

- ❖ Estimation techniques for project duration in financial services and banking
 - Analogous estimation
 - Parametric estimation
- ❖ Creating and managing project schedules
 - Gantt charts
 - Network diagrams (PERT/CPM)

Hands-on Activity: Using scheduling software to develop a project timeline for a financial services project, with emphasis on critical path analysis. Participants will utilize project management software to create a detailed project schedule, identifying critical tasks and dependencies to optimize project timelines.

Day 2: Risk Management and Compliance in Financial Services Projects

Module 4: Risk Management in Financial Services Projects

- ❖ Identifying and assessing risks specific to banking and financial services
 - Risk identification techniques (SWOT analysis, risk brainstorming)
 - Qualitative and quantitative risk analysis
- ❖ Strategies for risk response planning and mitigation
 - Risk response strategies (avoidance, mitigation, transfer, acceptance)
 - Contingency and mitigation planning

Hands-on Activity: Risk identification workshop focused on financial services project scenarios, followed by the development of risk response plans. Participants will engage in a facilitated discussion to identify potential risks in financial services projects and develop comprehensive risk response plans to mitigate or address these risks effectively.

Module 5: Regulatory Compliance and Governance

- ❖ Overview of regulatory frameworks impacting financial services projects
 - Basel III, Dodd-Frank Act, Sarbanes-Oxley Act
 - Compliance requirements for financial reporting and data security
- ❖ Importance of governance and compliance in project management
 - Roles and responsibilities of project governance
 - Integration of compliance requirements into project plans

Hands-on Activity: Mock compliance audit exercise, where participants analyze a project plan against regulatory requirements and propose necessary adjustments. Participants will simulate a compliance audit scenario, reviewing a sample project plan to identify compliance gaps and recommending corrective actions to ensure alignment with regulatory standards.

Day 3: Project Communication and Stakeholder Management

Module 6: Stakeholder Management in Financial Services Projects

- ❖ Identifying stakeholders and their interests in banking projects
 - Stakeholder analysis matrix
 - Power/interest grid
- ❖ Effective communication strategies for stakeholder engagement
 - Communication planning
 - Stakeholder engagement matrix

Hands-on Activity: Stakeholder mapping exercise, followed by role-playing scenarios to practice communication techniques with various stakeholders. Participants will map stakeholders based on their influence and interest in the project, then engage in role-playing exercises to practice effective communication strategies tailored to different stakeholder groups.

Module 7: Project Leadership and Team Management

- ❖ Leadership styles and strategies for motivating project teams
 - Situational leadership
 - Team development stages (forming, storming, norming, performing)
- ❖ Conflict resolution techniques in financial services projects
 - Negotiation and compromise
 - Mediation and arbitration

Hands-on Activity: Team-building exercise focused on enhancing collaboration and resolving conflicts within a financial services project team. Participants will participate in team-building activities designed to improve communication, foster trust, and address conflicts constructively within a project team setting.

Conclusion:

- ❖ Recap of key learnings and takeaways from the training
- ❖ Discussion on applying project management principles in participants' current or upcoming projects within the financial services and banking sector.

Outcomes:

1. Understand the unique challenges and requirements of project management in financial services and banking.
2. Gain proficiency in applying project management best practices, tools, and techniques tailored to this industry.
3. Develop the ability to mitigate risks and overcome obstacles commonly encountered in financial services and banking projects.
4. Enhance project leadership and communication skills for effective stakeholder management.
5. Acquire insights into regulatory compliance and governance frameworks relevant to project management in financial services and banking.

Target Audience:

- ❖ All employees oversee projects.



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Expert's Profile: Dr. Arezou Harraf

An experienced educator, Dr. Arezou Harraf holds a Ph.D. in Technology Management and Human Resource Training and Development. She serves as the Head of the Department of Business Studies at Box Hill College Kuwait. She is a Visiting Assistant Professor at the University of Nevada Las Vegas during the summer term. She also serves as an academic advisor for several MBA students at Maastricht University.

Dr. Harraf is the founder and CEO of Learn & Evolve LLC. In this capacity, she helps organizations use strategy, science, and psychology to address workforce challenges such as low performance, productivity, turnover, and retention issues. Moreover, Dr. Harraf is co-founder of Amplify Women Leadership Boot-camp to train women with skills to help them advance to executive positions within their organizations and or become successful venture creators and entrepreneurs. With a focus on the future of technology and HR, she consults with organizations on improving existing in-house technology platforms to enhance features relating to HR and employee needs.

Dr. Harraf is vice-chairperson of the Board of Directors at ABCK-Am-Cham Kuwait, where she also leads the Women in Business and Knowledge Economic focus groups and holds additional memberships in the Academy of Human Resource Development, Academy of Human Resource Management, Chartered Institute of Personnel Development, Academy of Management, Women of Tech in MENA, and Graduate Women in Science.