



BAIPHIL cordially invites you to the two-day Seminar on:

Business Partnering Competencies for Effective Stakeholder Engagement (16 CPD Units)

Speaker:

Ms. Odette Abaya-De Guia

Training Consultant

I. COURSE DESCRIPTION AND RATIONALE

A Finance Officer, Auditor, Compliance Officer, Risk Management Officer play multiple roles:

- Partners of management in ensuring that effective control systems are in place and processes and decisions agreed upon are implemented;
- Technical Knowledge Expert taking the role of a consultant and/or resource person to provide opinions, give support and advice on strategic and operational decisions through insights that drive better business performance
- Facilitator of Change, making new knowledge, technology and policies happen in the organization with influencing skills

An expectation of Officers is the ability to work with key stakeholders and other business peers - to be heard, get things done, and establish effective working relationships.

To be able to do this, they should have the needed competencies to engage the stakeholders; know the strategic direction and plans; knowledge of the Bank business model, a comprehensive understanding of the organizational system that implements the business model and possess effective interpersonal relationships skills to communicate goals, issues and concerns effectively, while building a strong partnering relationship. They add value to their technical competencies by being able to engage with other people across different areas of the business in the conduct of their functions. They take the role as partners on financial, risk, compliance and audit matters.

In the end, they should be able to establish more effective engagement with key stakeholders and people across the organization and be a partner in understanding, analyzing and solving problems/ business issues or concerns.

II. TARGET PARTICIPANTS

This course is offered to those who should have core finance, audit, compliance and risk management skills.

Ideally, they are the Vice Presidents and Middle Managers of:

1. Controllership Units
 2. Audit Units
- As well as:
3. Compliance Officers
 4. Risk Officers

III. COURSE OBJECTIVES

At the end of the two-day course, the participants will be able to:

1. Discuss the definition of a business partner and list the key success factors of an incumbent: core competencies, business competencies, role clarity, the power bases and value-adding functions to have a clear understanding of the concept of business partnering.
2. Using the 7 S Model of McKinsey, discuss the various aspects of an organization and their interrelationships and identify the areas of components of the aspects that are relevant to finance, audit, compliance and risk functions:
 - Discuss strategic aspects
 - Review the organization design and how it supports achievement of objectives; the compliance requirements by BSP of Banks for internal control systems
 - Discuss the dynamics of having effective Systems, Staff and Skills to have a higher level of productivity
 - Discuss the centrality of Management Style and Shared Values in managing organizations
 - Present a matrix of areas of convergence with the 4 functions mentioned above.
3. Discuss, through a review, the bank business model and the Key Business Indicators (KBOs) to have a wholistic view of the business and prepare a stakeholder map, identify needed transactions and identify ways to manage them effectively.
4. Demonstrate skill using interactive learning methodologies to develop the following communication skills
 - Conveying enthusiasm thru body language and feeling tone
 - Giving feedback; handling negative feedback
 - Reflective Listening
 - Probing
 - Summarizing discussions/Integrating concepts

5. Discuss approaches to present reports to Senior Management and to the Board.
 - The Inverted Triangle
 - Numbers vs words
 - Delivering bad news
 - Tips: business presentation skills; translating the numbers into a business story

6. Demonstrate influencing skills:
 - Assertiveness: verbal, non-verbal
 - Establishing linkages; mobilizing linkages

IV. COURSE OUTLINE

- Framework for success: The roles of a business partner: core, business and behavioral competencies
- The value-adding functions of a business partner
- The required power bases to enhance effectiveness
- Understanding organizations: the 7 S Model
- A Review of the business model of a Bank and the Key Business Indicators
- Touching base with key stakeholders
- A Review of the Communication Process
- Management Communication: Upward Communication
- Effective Communication with Assertiveness Skills: From Passive to Assertive; Avoiding Aggressive Communication
- Building/Strengthening Linkages

Schedule:

February 21-22, 2020 (Friday-Saturday); 8:30 A.M. to 5:00 P.M.

Venue:

Dusit Thani Manila, Ayala Center, Makati City.

Registration:

Please complete the Registration Form below and send it to training@baiphil.org or fax to (02)8853-0889. Registration form received will serve as notice for reservation only.

Registration Form:

Full Name : _____
First Name
M.I
Surname

Nick Name: _____ Email Address: _____

Telephone no.: _____ Cellphone no.: _____

Designation: _____

Department: _____

Sponsoring Bank/ Institution: _____

How did you know about this program?
(please check appropriate box)

- Email from BAIPHIL
 Program Handout
 BAIPHIL Website
 BAIPHIL Facebook page
 Others, please specify

REMARKS (on nominees specific & immediate training needs, potentials, etc.)

Signature of Nominee:

Recommended by:

 Signature Over Printed Name

 Signature Over Printed Name

Registration Dues:

Php9,000.00 / participant for Member Banks

Php10,000.00 / participant for Non-Member Banks

(Inclusive of AM Snack, Lunch, PM Snack, Certificate of Attendance and materials)

Payment Options:

- Deposit thru our Bank Account:

Account Name: Bankers Institute of the Philippines, Inc.

Name of Bank : Bank of Commerce – Dela Costa/Alfaro Rd.. Br.

Acct. No. : 101-00-004876-4

Please fax or email the deposit slip and indicate the name of your bank, participants and seminar to be attended

- Bring Check Payment on the day of Seminar. (Check payable to Bankers Institute of the Philippines, Inc. or BAIPHIL)
- Deliver check payment to BAIPHIL Office at Unit 2103, 21st Floor, The Peak Tower, #107 L.P. Leviste Street, Salcedo Village, Makati City.

Payment should be made on or before the seminar date payable to Bankers Institute of the Philippines, Inc. (BAIPHIL). NO PAYMENT IN CASH DURING THE SEMINAR DAY.

For inquiries, please call the BAIPHIL Secretariat at (02) 8853-4457 or 8519-2433.

Registration form may be reproduced, and fax at no. (02) 8853-0889 or e-mail at: training@baiphil.org

Cancellation Guidelines :

Deadline of Submission of Registration is February 12, 2020(Wednesday)

BAIPHIL reserves the right to cancel programs due to low turn-out of registration, illness of resource speaker, inclement weather or unforeseen events. As such, participants to the program or their HR representatives will be advised either through e-mail or by phone, at least five working days prior to the learning event otherwise same shall be billed accordingly.

BAIPHIL is responsible only for the full refund of the registration fee but not for the transportation expense of the participants who have booked their travel in advance.

Should a participant decide to cancel his/her registration, he/she may opt for a refund or transfer his/her participation in the program to another colleague by sending in writing his cancellation or transfer notice to BAIPHIL. A 100% refund or transfer will be made if the advice is received within five working days before the seminar run.