Bank Strategy in Action

A strategy and capital allocation simulation that lets you lead your own bank!



Bank Strategy in Action

Why strategy and structure matter

The modern bank is a complex, interconnected system.

Capital, funding and infrastructure are shared by every division, so a decision in one area changes the results of the others.

Siloed thinking and misaligned incentives can erode capital and damage long-term reputation.

The Solution

Bank Strategy in Action puts participants in the decision-making seat. Teams set the bank's strategy, allocate capital and funding, then run four business divisions and see the effect on Return on Equity (ROE).



Bank Strategy in Action

The programme at a glance

Duration
Flexible: half-day to two days

Audience
Infrastructure and support functions, cross-divisional managers and senior leaders

Learning approach
Kolb cycle
– Experience
→ Reflection
→ Concept
→ Application

Format
Highly interactive simulation, team-based challenges, facilitated debriefs

Delivery
Available face-to-face, virtual, or hybrid

The simulation experience

Participants work in teams. They first agree the bank's strategy, capital allocation and funding, then rotate through four business divisions.

Over the course of the simulation, teams face a series of real-world challenges:

- Private/retail bank: Deploy cash to lend, set credit policy and size each corporate client's loan
- Corporate Bank: Provide letters of credit and FX hedges to a multinational client
- Global Markets: Execute client securities trades; better execution wins more orders
- Asset Management: Manage a multi-asset fund against a client benchmark

Every decision affects consolidated performance and Return on Equity (ROE), so participants see how the strategy set at the start plays out across the bank.

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Key learning outcomes

By the end of the programme, participants will be able to:

1. **Understand** how strategy, capital and funding decisions set the direction of the whole bank.
2. **Explain** how each business division earns its return and which risks it carries.
3. **Evaluate** the trade-offs between funding choices, buffers and investment in infrastructure.
4. **Identify** the key clients of each division and how products and solutions support them.
5. **Demonstrate** how collaboration across divisions and infrastructure functions improves performance and breaks down siloed thinking.
6. **Apply** the values and culture of your bank to strategic and business decisions.

Agenda snapshot

Part one

Strategy and set-up

- Welcome and programme briefing
- Set-up: agree strategy, capital allocation and funding
- Phases 1–2: Private and Corporate bank
- Facilitated debrief: decisions, trade-offs, lessons learned

Part two

Divisions and review

- Phases 3–4: Global Markets and Asset Management
- Review: consolidated performance and ROE against the strategy
- Team presentations: strategies and outcomes
- Final debrief: connecting insights to your bank

Timings flex to a half-day, full-day or two-day format.

Why choose us?

Our difference: We combine commercial realism with behavioural insight, ensuring learning sticks and translates into real impact.

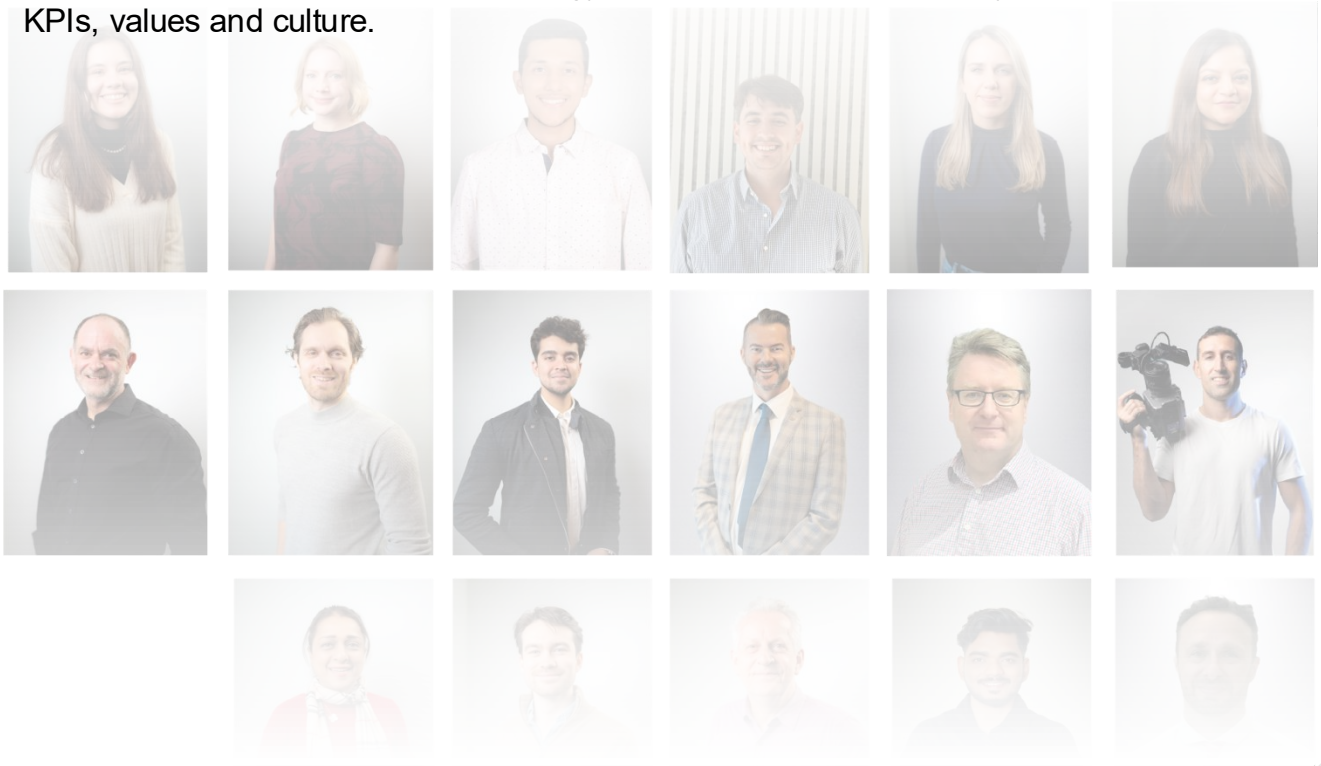
Proven track record: Trusted by global banks, Fortune 500 companies, defence and aerospace leaders, and high-tech manufacturers.

Flexible delivery: In-person, digital, or hybrid - designed to scale to your needs.

Measurable impact: Participants leave with a clearer view of how strategy, capital and infrastructure drive performance, and practical insights to apply in their own roles.

Ready to bring strategy to life for your teams?

Contact us to explore how Bank Strategy in Action can be tailored to your divisions, KPIs, values and culture.





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