

OFERTA CURS
PLANIFICARE STRATEGICA SI DE MARKETING
DEZVOLTAREA PRODUSELOR FINANCIARE
PENTRU
INSTITUTII FINANCIARE NEBANCARE
si/sau
CASE DE AJUTOR RECIPROC

1. LOCATIE:

Sala de curs acreditata, accesibila, dotata cu mobilier , echipamente si materiale de curs specifice: support de curs, support exercitii, videoproiector, flipchart, spatiu pentru desfasurare exercitii si teste.

2. LECTORI:

Acreditati si calificati pentru a desfasura activitati de instruire, cu studii, calificari si experienta paractica in domeniul cursului.

3. AGENDA CURS: Cursul este oferit in limba Romana si/sau limba Engleza

Ziua 1.		
1. Introducere in Planificarea Strategica. 2. Harta strategica 3. Analiza SWOT		
Ora	Subiect prezentat/ Discuții	Activități întreprinse
9:30 - 10:00	Introducere in programul de formare și obiectivele primei zi a sesiunii de instruire	Introducere: Prezentarea participantilor si trainerilor, prezentarea obiectivelor sesiunii de instruire, program, metodologie, logistica si reguli de baza: pauze, lucru in grupuri, evaluare
10:00 -11:30	1. Prezentarea generală a conceptelor de planificare strategică: viziune strategica si misiune a MFI/CAR	Prezentarea conceptelor, discuție cu privire la implicarea conducerii si a personalului executiv al MFI/CAR în planificarea strategică.
11:30-11:45	Pauza de cafea	

11:45 -13:00	2. Harta strategica. Managementul schimbarii. Management strategic - principalii pasi. Pregatirea si alocarea resurselor.	Prezentarea conceptelor. Lucru in grupuri pentru estimarea resurselor MFI/CAR si alocarea acestora.
13:00-14:00	Pauza de pranz	
14:00 -15:15	3. Analiza SWOT Puncte Tari si Puncte Slabe	Lucru in grupuri pentru realizarea analizei SWOT a MFI/CAR Prezentarea analizei SWOT- Puncte tari si Puncte slabe .
15:15- 15:30	Pauza de cafea	
15:30 -16:15	Analiza SWOT - continuare Oportunitati si Pericole / Amenintari	Prezentarea analizei SWOT- Oportunitati si Pericole /Amenintari
16:15 -16:30	Rezumatul zilei: 1. Introducere in planificarea strategica 2. Harta strategica. 3 Analiza SWOT	Rezumatul conceptelor prezentate în prima zi a programului de instruire
Ziua 2.		
4. Obiectivele MFI/CAR; 5. Obiective Sociale și Financiare 6. Obiective SMART; Plan de Afaceri		
Timp	Subiect prezentat/ Discuții	Activități întreprinse
9:00 - 9:10	Introducere in programul de formare și obiectivele celei de-a 2 zi a sesiunii de instruire	Prezentarea obiectivelor sesiunii de instruire, programul si metodologia, exercitiilor si principalele subiecte de discuție.
9:10 - 11:30	4. Definirea obiectivelor organizatiei; Responsabilitatea Organizationala si Sociala Codul european de bune practici- Capitolul 1. Relatiile cu clientii si investitorii. Protectia datelor referitoare la clienti. Obiective Sociale vs. Obiective financiare	Prezentarea conceptelor si cerintelor Codului European de Bune Practici (CEBP). Discutii privind implicarea si responsabilitatile personalului de conducere al MFI/CAR in definirea obiectivelor organizationale.
11:30-11:45	Pauza de cafea	
11:45 -13:00	5. Operationalizarea obiectivelor sociale si financiare. Obiective SMART	Prezentarea conceptelor Exercitii/ Lucru in Grup pentru identificarea obiectivelor SMART Prezentare si discuții privind obiectivele organizatiei.
13:00-14:00	Pauza de pranz	
14:00 -15:30	Elaborarea (intocmirea) unui sistem de măsurare a obiectivelor	Prezentarea conceptelor Discutii privind sistemul de masurare a obiectivelor.
15:30-15:45	Pauza de cafea	

15:45 -16:30	6. Planul de afaceri al MFI/CAR. Continut si utilizare	Prezentarea conceptelor Discutii privind implicarea si responsabilitatile personalului de conducere al MFI/CAR in planificarea afacerii.
16:30-16:45	Rezumatul zilei 2 : obiective SMART, Planul de Afaceri.	

Ziua 3.		
7. Planul de Marketing. Monitorizarea implementarii strategiei, obiective, indicatori si tinte		
Timp	Subiect prezentat/ Discuții	Activități întreprinse
9:00 - 9:10	Introducere in programul de formare și obiectivele celei de-a 3 zi a sesiunii de instruire	Feedback-ul participantilor, sumarul principalelor concepte si tehnici.
9:10 - 11:30	7. Planul de Marketing, Mix-ul de Marketing, continut, utilizare. Codul european de bune practici- Capitolul 2. Guvernanta	Discutii privind implicarea si responsabilitatile personalului de conducere al MFI/CAR in planificarea de Marketing.
11:30-11:45	Pauza de cafea	
11:45 -13:00	Monitorizarea implementarii strategiei, obiective, indicatori si tinte.	Prezentarea conceptelor
	Codul european de bune practici- Capitolul 4- Standarde de raportare	Prezentare, discutii privind conformitatea procedurilor MFI/CAR cu CEBP
13:00-14:00	Pauza de pranz	
14:00 -15:30	Implementarea strategiilor. Graficul Gantt privind implementarea activitatilor Alocarea resurselor	Prezentarea conceptelor Asistati de trainerii, participantii vor pregati graficul de activitati- Gantt .
15:30-15:45	Pauza de cafea	
15:45 -16:30	Alocarea resurselor- continuare	Discutii privind alocarea resurselor.
16:30-16:45	Rezumatul conceptelor prezentate in ziua 3	
Ziua 4.		
7. Planul de Marketing- continuare; 8. Dezvoltare de produse noi/ branding		
Timp	Subiect prezentat/ Discuții	Activități întreprinse
9:00 - 9:10	Introducere in programul de formare și obiectivele celei de-a 4 zi a sesiunii de instruire	Prezentarea obiectivelor sesiunii de instruire, programul si metodologia, exercitiile si principalele subiecte de discuție.
9:10 - 11:30	Plan de Marketing. Continuare	Prezentarea conceptelor. Discutii privind implicarea si responsabilitatile personalului de conducere al MFI/CAR in

		planificarea de Marketing.
11:30-11:45	Pauza de cafea	
11:45 -13:00	8. Dezvoltare de produse noi. Intelegerea nevoilor clientilor tinta.	Prezentarea conceptelor. Exercitii/ Lucru in Grup pentru intelegerea nevoilor clientilor tinta.
13:00-14:00	Pauza de pranz	
14:00 -15:30	Proiectarea serviciilor de economisire Proiectarea serviciilor de creditare pentru activitati generatoare de profit.	Prezentarea conceptelor. Pasi in dezvoltarea de noi produse.
15:30-15:45	Pauza de cafea	
15:45 -16:00	Prezentarea planului de dezvoltare de noi produse	Comentarii si recomandari privind strategia de comunicare
16:00 -16:30	Rezumatul conceptelor prezentate Evaluarea sesiunii de instruire Inchiderea programului de instruire	Evaluarea sesiunii de instruire pe baza chstionarelor de evaluare

CONTENT: Define the organization's mission statement, vision , business plan development with focus on financial performance and social impact and the development of support services to the members/ clients, financial planning and budgeting and liquidity management, scenario analysis, marketing research on members/ clients' needs assessment , market analysis in order to identify the potential market niche and area of expansion, market trends and opportunities, customer protection principles; new financial products development.

Day 1. - 1. Introduction to strategic planning; 2. Strategy map; 3. SWOT		
Time	Subject presented/ debated	Activities undertaken
9:30 - 10:00	Introduction of the training program and the first training session's objective	Opening remarks: Introduction of participants and trainers, presentation of the training session objective, training session program and methodology and logistics and ground rules: breaks, training equipment, work in groups, evaluation.
10:00 - 11:30	1.Overview of Strategic planning concepts: CAR_ Tractorul Brasov strategic vision and missions	Presentation of the concepts, discussion on the involvement of the MFI/CAR's board and executive staff in strategic planning
11:30 -11:45	Coffee break	
11: 45 -13:00	2.Strategy map; change management Strategic management process main steps. Preparation and resource allocation	Presentation of the concepts Work in groups to estimate the MFI/CAR's resources and to allocate them.
13:00 -14:00	Lunch break	
14:00 -15:15	3.SWOT analysis Strengths and Weaknesses	Work in groups to develop the MFI/CAR 's SW analysis Presentation of the SW analysis
15:15 - 15:30	Coffee break	
15:30 -16:15	SWOT analysis Opportunities and Threats	Work in groups to develop the MFI/CAR 's OT analysis Presentation of the OT analysis
16:15 -16:30	Summary of the day: 1 Introduction to strategic planning, 2. Strategy map,3. SWOT	The summary of the concepts presented in day 1, of the training program
Day 2. - 4. MFI/CAR 's goals; 5. Social and financial goals; 6. Smart objectives; business plan		
Time	Subject presented/ debated	Activities undertaken
9:00 - 9:10	Introduction of the day2 training program and the training session's objective	Presentation of the training session objective, training session program and methodology , exercise and main topics for discussion
9:10 - 11:30	4.Define the Organisation's goals; Corporate and social responsibility	Presentation of the concepts, and EU Code requirements. discussion on the involvement

	EU code of good conduct – Chapter 1. Client protection Strategic social goals versus financial goals	and responsibilities of MFI/CAR's executive staff in defining the organisational goals.
11:30 -11:45	Coffee break	
11:45 -13:00	5. Operationalizing the strategic social and financial goals SMART objectives	Presentation of the concepts Exercise / Work in groups to identify the SMART objectives ; Presentation and Discussion on the org's objectives.
13:00 -14:00	Lunch break	
14:00 -15:30	Development of a objectives measurement system	Presentation of the concepts Discussion on the Objectives' measurement system
15:30 - 15:45	Coffee break	
15:45 -16:30	6.MFI/ CAR business plan Content, BP utilisation.	Presentation of the concepts. Discussion on the involvement and responsibilities of MFI/CAR Brasov executive staff in business planning.
16:30 – 16:45	Summary of the day 2 – SMART Objectives, business plan	
Day 3. – 7. Marketing plan; Monitoring strategy implementation, objectives, indicators and targets.		
Time	Subject presented/ debated	Activities undertaken
9:00 - 9:30	Introduction of the day 3 training program and the training session's objective	Feedback from trainees, summary of main concepts and techniques.
9:30 -11:30	7. Marketing plan, marketing mix, content , utilization EU cod of good conduct: Chapter 2 Governance	Presentation of the concepts. Discussion on the involvement and responsibilities of MFI/CAR's executive staff in marketing planning.
11:30 -11:45	Coffee break	
11:45 -13:30	Monitoring strategy implementation, objectives, indicators and targets.	Presentation of the concepts
	European code of good conduct Chapter 4 –reporting standards	Presentation, discussion on the compliance of MFI/ CARs procedure with ECGC
13:30 -14:30	Lunch break	
14:30 -15:30	Strategy implementation Gantt chart of implementation activities Allocation of resources	Presentation of concepts. Assisted by the trainers, the trainees will work to prepare the activities Gantt chart discussion on resources allocation.
15:30 -16:00	Summary of the concepts presented	
		Evaluation based on the training session evaluation questionnaires
Day 4. 7. Marketing plan cont.; 8. New product development/ branding		
Time	Subject presented/ debated	Activities undertaken
9:00 - 9:30	Introduction of the day 4 training program and the training session's objective	Presentation of the training session objective, training session program and methodology ,

		exercise and main topics for discussion.
9:30 - 11:30	Marketing plan 2.	Presentation of the concepts, discussion on the involvement and responsibilities of MFI/ CAR 's executive staff in marketing planning.
11:30 -11:45	Coffee break	
11:45 -13:00	8. New product development. Understanding the needs of the target clients. Designing saving services Designing credit products for income generating activities	Presentation of the concepts. Exercise/ Work in groups for understanding the needs of the targeted clients.
13:00 -14:00	Lunch break	
14:00 -15:30	Designing saving services Designing credit products for income generating activities	Work in groups for understanding the needs of the targeted clients.
15:30 - 15:45	Coffee break	
15:45 -16:00	Presentation of new products development plan	Comments and recommendations on the communication strategy.
16:00 -16:30	Summary of the concepts presented Evaluation of the training session Closure of the training program	Evaluation based on the training session evaluation questionnaires