



3rd

4th

DECEMBER

Hotel Novotel,
Mumbai

SCHEDULE

Project Management for **Banking and Financial Service Providers**

Schedule



Why Project Management for Banking and Financial Services?

Financial service providers are now operating in a tight market place with increasing customer demands; hence the focus is on improving delivery channels, developing effective branding strategies, regulatory compliance as well as an emphasis on cost reduction.

The result is that a large number of business projects are being implemented ranging from new product development and launches, alliances, mergers, advanced customer support systems, loyalty schemes to name a few. These business projects are in addition to the already ongoing projects which are focused on adhering to the forthcoming regulatory and reporting standards. Consequently for successful delivery, project owners have to manage a wide range of integration complexities within the organisation, branches, as well as with other partners.

As new projects are launched on a daily basis with increased time pressures on delivery, most often with unrealistic time lines as well as with limited resource availability, there is an urgent need to reassess the project management work environment and to have another look on how projects can be managed more effectively and efficiently in the current scenario. To facilitate this relook on the project management work environment, PMI India is pleased to announce a two day conference to be held on the 3rd and 4th December 2009, which aims to bring together all those involved in managing projects in the financial services sector, creating an interactive and knowledge sharing meeting ground where you can explore new ideas and see current best practices in use during the various stages of managing projects.

If your role involves design and delivery of new initiatives, managing, planning and delivering the organisational, financial and operational aspects of a project within the Financial Services environment, then this conference is a must attend for you.

Advisory board members

Kummar Vaalsalam: Vice President Publications, PMI Mumbai Chapter / Project Director, HRM Group, Hexaware Technologies Ltd

Minal Deshpande: VP FSI & TMT, Deloitte Consulting Pvt. Ltd

Prof. Kshirsagar : Professor & Advisor to the Dean, SP Jain Institute

Umesh Jain: CIO, Yes Bank

Ajay Kapoor: Sr. Vice President, BPRG Group, HDFC Bank

3RD DECEMBER ↓

09:00 _{AM}	Registration and morning refreshments	09:30 _{AM}	Conference opening remarks
09:40 _{AM}	Welcome address The value of project management to organisations. Steve Fahrenkrog, Vice President for Regional Development, PMI		
10:10 _{AM}	Keynote: Managing projects in the industry	10:35 _{AM}	Refreshment break

Project Management Framework, tools and best practises

11:00 _{AM}	Examining the project management process for projects Developing an project management framework based on organizational needs <ul style="list-style-type: none">Defining project management organisational structuresEstablishing project strategy, viability and investment planScoping and phasing of the project to achieve early implementation and benefit realisationProject life cycle management
11:30 _{AM}	ITIL and Project Management – Service context
12:30 _{PM}	Panel Discussion: Analysis of tools and practices used for Project Management within the financial services work environment Choosing the right project management tools is essential for teams to communicate, share knowledge and coordinate for successful project delivery. The panel will discuss the PM tools that are used within the banking and financial service industry for effective management of project and how can these tools be used most effectively
12:45 _{PM}	Networking lunch

Strategic insights - Project management case studies

02:00 _{PM}	ITIL and Project Management – Service context		
02:30 _{PM}	CASE STUDY: Developing and Rolling out a Project Management framework for ‘buyer’ side of technology As technology plays a major role which has to be updated on a regular basis for the banking and financial service industry for business success, it is important to lay down a project management framework for the ‘buyer’ side of the technology to ensure timely implementation.		
03:00 _{PM}	CASE STUDY: Mobile and Internet Banking	03:30 _{PM}	Refreshment break
04:00 _{PM}	CASE STUDY: Best practices in managing projects which involves partners alliances and contractors		
04:30 _{PM}	Panel Discussion: Best practises in managing multiple projects with strict time lines As new projects in the financial services industry are being initiated on a daily basis, often with very narrow time margins for delivery, projects teams are under increased time pressure with project managers under high stress levels with the number of projects they are being asked to manage, especially if these projects are large and high profile in nature. Ideally, project managers should manage one project at a time so they can give it their full attention. The more projects a project manager undertakes the less effective they become. However, the reality of the current business environment is that project managers are expected to manage multiple projects concurrently. Time management is emerging as the single most important issues for managing projects, With deadlines looming and in need for project completion quality is often sacrificed leading to inadequate closure and also resulting in project failure. The root cause can be traced back to how organisation handle and manage projects on a macro perspective.		
05:15 _{PM}	Closing remarks	05:30 _{PM}	End of Day One

4th DECEMBER ↓

09:30 _{AM}	The value of teaching project management in organisations. Dr. Edwin Andrews, , PMI		
	PROJECT HUMAN RESOURCE PLANNING IN THE FINANCIAL SERVICES ENVIROMENT To successfully meet this challenge on implementation of new technology and managing of integration complexities project managers have to select and manage a team of experienced and competent professionals most suitable for the project. The Challenges financial service providers face is in creating a team for project execution, where project responsibilities are given to different department executives / project managers appointed. Given the temporary nature of projects means that staff will be new and so will be the working relationship. This give rise to conflict within the team as well as issues related to the change within the project team. Resource Planning is considered the most important phase because if you don't have the right people and plan to manage them properly, the next two are irrelevant		
10:00 _{AM}	Leading and Managing people in the financial service project environment		
	Key steps in creating and managing a team which will align with the project goals including technology and cost barriers. Defining project management team structure. Acquiring project teams. Identify roles, responsibilities and reporting relationships. Sensitising the unique need of the project environment Dealing with changes and conflicts – Conflict management in a project environment. Plans to cope with organizational disjoints. Changing number of staff due to work related changes in the project lifecycle.		
10:30 _{AM}	Project Management Training As project management plays a vital role in the success of any organization, this session will focus on professional training methodology both at a corporate as well as on an individual basis. The session will discuss on developing project management skills include motivation, communication, conflict management, problem solving, team building, supervision and negotiation.		
11:00 _{AM}	Refreshment break		

Maturing The Project Management Work Environment

11:30 ^{PM}	Project risk management It is very important to recognise the innate risk and complexities of the project before allocating team and resources. Effective risk management enables proactive project management as well as raises awareness of risk associated with the project to management and stakeholders thereby managing expectations and organise the team quickly for subsequent action Risk evaluation technique for projects, What are the most overlooked risks in while managing projects in banking and financial services?, Overcoming organizational obstacles of the developed risk management program		
12:00 ^{NOON}	Program and project portfolio management Program management is a widely used and is an accepted approach to managing complex projects, which lead towards an improvement in an organisation's performance whereas portfolio management aims to meet the challenges of operating in a multiproject environment by determining the optimal mix of projects and products within a portfolio. This presentation will include key highlights on how program management and project portfolio management can aid the financial service industry. Defining program management for the banking and financial service industry, Linking program management to organisational strategy Program governance, Project portfolio management for financial services providers		
12:30 ^{PM}	Project performance measurement & mgmt.	01:00 ^{PM}	Networking lunch

Extended Presentation: Project Communication Management

Communication management is one of the essential functions that can dramatically affect the outcome of a project. Project managers must create and effectively use a communication plan that performs two principle functions: collect the right data and disseminate appropriate information in a timely manner. To do this effectively, project teams are under an obligation to identify the appropriate audiences, develop appropriate communication media, establish a communication schedule, and manage the flow of information in and out of the project team. The focuses of this session is on the tools and techniques that project teams can use to build an effective communication plan. Participants will have the opportunity to experience how to conduct an effective stakeholder assessment, identify audiences of the project, design and implement a communication strategy, and prepare more effective project reports for their stakeholders.

02:00 ^{PM}	Developing strategies and process for gathering and sharing information with project stakeholders. How to create interest in and ensure involvement of other business departments in the project life cycle. Communication management while managing large scale projects		
03:30 ^{PM}	Refreshment break	04:00 ^{PM}	Roadmap of Project Management for Banking and Financial services
04:30 ^{PM}	Panel Discussion This two benched panel, one - an expert panel of senior speakers, the other consisting of conference attendees, will exchange views about current issues and practical challenges faced during stages of project management, along with potential solutions drawn from real life experiences.		
04:50 ^{PM}	Closing remarks	05:00 ^{PM}	Close of conference

Registration fee per user



Single Delegate

INR 5500
+ SERVICE TAX



Group of Four

INR 5000
+ SERVICE TAX



Group of Eight

INR 4500
+ SERVICE TAX

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**The conference agenda is indicative in nature and is subject to changes based on the speaker's expertise.
 .Conference speakers may be subject to change based on their availability on the date of the conference.

Conference organized by: PMI Organization Center Pvt Limited

Conference produced by: Strategic Business Council