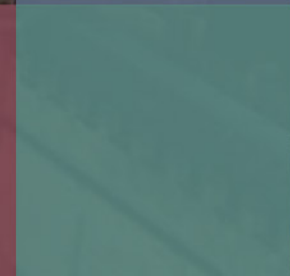
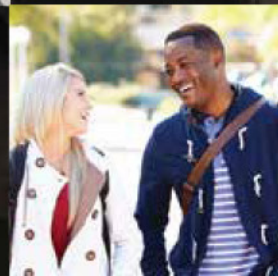
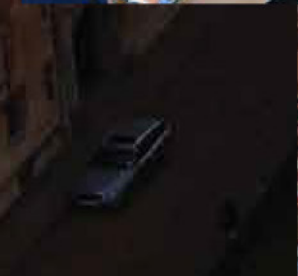
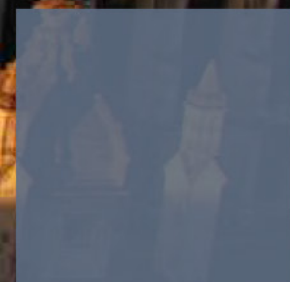


**iGTB OXFORD**  
— SCHOOL OF TRANSACTION BANKING —

# **iGTB OXFORD SCHOOL OF TRANSACTION BANKING**

**PROSPECTUS  
17-19 MAY 2023**



# Corporate Banking Today



STEADY PROFIT  
CONTRIBUTION  
EVEN IN THE  
WORST ECONOMIC  
TIMES

INDUSTRY-WIDE  
REVENUES OF  
BILLIONS OF  
DOLLARS

Global transaction banking has long been described as a bank's crown jewels because of its steady profit contribution even in the worst economic times, its reputation as a "sticky" core banking service, and its long history of strong growth.

As a business that is generating industry-wide revenues of over \$500 bn, the stakes are high for getting it right and protecting this valuable franchise.

Corporate bankers have a complex set of issues to contend with in order to optimize their management of this changing and challenging business. An important key to success is ensuring that Corporate Banking executive teams are equipped with the appropriate competencies through the development phases towards maturity.

## iGTB Oxford School of Transaction Banking

As the leading provider of banking solutions to a number of the world's largest banks, iGTB has a unique vantage point to spot opportunities and obstacles to operational excellence. As an organization, we are actively engaged in optimizing our client's abilities to compete more effectively in the marketplace working with them to strengthen their client franchises.

The iGTB Oxford School of Transaction Banking is held annually (with a break in 2020/21 because of Covid) in Oxford and culminating at the Oxford and Cambridge Club in London, although it has also been held outside of Oxford, for example in Singapore. It is a two and a half day immersive learning experience that is designed to help transaction banking executives develop a winning strategy and thrive in the complex and fast-moving world of Transaction Banking. Now the curriculum is extended to embrace also key aspects of Corporate Banking, during which both business and technology themes are interwoven.

A unique vantage point to spot opportunities and obstacles to operational excellence

.....  
A two and a half day face-to-face immersive learning experience

.....  
Designed to help corporate banking executives develop winning strategies

.....  
Empowering improved decision making and change management





# Insights from Practitioners and Peers

The programme is designed as a highly participatory executive-level learning event. You will hear from seasoned practitioners of Corporate Banking who have achieved important success in major global and regional financial institutions. Their practical insights will be punctuated by peer-to-peer learning exercises, enabling participants to grasp a deep understanding of how other people have addressed many common challenges.

Case studies from global leading banks will be a valuable part of the curriculum.

Their presentations and follow-on discussions will help to clarify the lessons learned from real-life experiences.

## Programme Leadership

### **Andrew England**

Curriculum Director of the School, Board member of Intellect, Head of Strategy at iGTB  
Former McKinsey Strategic Advisor in Transaction Banking, formerly having leading Transaction Banking roles in Lloyds Banking Group, Unicredit, Deutsche Bank and Citi

### **Manish Maakan**

School Sponsor,  
iGTB Oxford School of Transaction Banking  
CEO, iGTB

### **Dr. Theodore Roosevelt Malloch**

Programme Director, iGTB Oxford School of Transaction Banking, CEO, The Roosevelt Group  
Former Professor of Strategic Leadership and Governance, Henley Business School  
Senior Fellow in Management Practice, Saïd Business School, University of Oxford

### **Borna Ljubicic**

Coursework Leader, iGTB Oxford School of Transaction Banking  
Head of Continental Europe, iGTB

## Expert Guests

Past courses have had expert session leaders, such as:

### **Werner Steinmüller**

Chairman, Deutsche Bank SPA, Italy

### **Andrew Bester**

Head of Wholesale Banking,  
Member of the Management Board  
ING, Netherlands

### **John Carroll**

Head of International and Transactional Banking,  
Santander UK

### **Richard Brown**

Head of Lending Product, Commercial Banking,  
Lloyds Banking Group, UK

### **Sergio Dalla Riva**

Head of Product Development Transaction  
Banking, Intesa Sanpaolo

### **John Cowan**

Chief Technology and Operations Officer,  
Payments Canada

### **José Luis Calderón**

Head of Transaction Banking,  
Santander Group, Spain

### **Philippe Penichou**

Managing Director, Head of Payments and Cash  
Management International  
Network, Société Générale

### **Srini Kasturi**

Global Head of Digital and Platforms,  
Barclays Corporate Bank

### **Michael Spiegel**

Global Head of Transaction Banking,  
Standard Chartered Bank

### **Dr. Gerard Lyons**

Chief Economic Strategist,  
Netwealth.

### **Marcus Treacher**

Member of the Board of Directors,  
ClearBank & CEO CB  
Investment Growth Holdings

### **Mark Smith**

Managing Director, Head of TTS EMEA, Treasury  
and Trade Solutions, Citi

### **Arvinder Dhesi**

Senior Client Partner, Korn Ferry

# A Comprehensive Agenda of Topics

The course has a series of learning modules that cover specific topics and have defined learning objectives.

## 1. The SME Challenge

SME are the lifeblood of today's economies and during the Covid pandemic new company creation exploded across the globe. Explore how banks need to change to carry embryonic companies into independent adulthood

## 4. Risk – Inside out

In the current environment, risk management becomes a key sustainability factor. Explore the corporate/commercial banking canvas (covering data risks, cybercrime, operational risks, project risks etc.) and related practices. How can Transaction Banks leverage their know-how to help clients manage risks?

## 7. Improving Net Interest Margin

With all the talk being on a healthy commission income line, banks are realising that maintaining balance sheet growth and relevance is no longer a 'given'. How are corporate banks gearing up to the challenge of asset growth and building low cost liabilities in the face of rapidly rising interest rates and fintech competition?

## 2. Building the Business

Capex spend remains a scarce resource. How can Corporate banks leverage their array of Transaction banking assets to do more business with existing client portfolios and be more innovative in penetrating new business opportunities?

## 5. ESG

ESG has become a key strategy for many banks. What are the challenges and best practices governing ESG? How can transaction banking contribute to the overall ESG agenda of the Bank?

## 3. Transforming the Base Platform

What are the realities that surround the re-engineering of the base operations platform? Uncover the myths and myriad of statistics to learn from the experiences of seasoned CIO professionals across 4 continents

## 6. AI & Data

AI is going mainstream in the workplace. What are the applications of AI in corporate banking, and how can rich data assets within transaction banking be leveraged for AI-powered capabilities?

“

I'm as proud of many of the things we haven't done as the things we have done. Innovation is saying no to a thousand things.”

~ Steve Jobs







# Oxford, London, Singapore Quintessential Learning Environments

“

The greatest gift that Oxford gives her sons is, I truly believe, a genial irreverence toward learning, and from that irreverence love may spring.

~ Robertson Davies

## Networking, Alumnus & Cultural Programme Further Your Learning

Throughout the course experience there will be opportunities for you to learn from your peers in a variety of relaxed and enjoyable settings. The evening events will take advantage of the host city's uniqueness. This continues after the course as you join a growing body of school alumni.

### • Pre-course

On Day 1 morning, join your course colleagues in a private guided walking tour of this amazing city that boasts such rich history.

### • Day 1

The curriculum of the course begins with registration and lunch, followed by an opening keynote speaker who will share a big picture view of the future of banking. The afternoon session starts the formal curriculum and finishes with the first piece of group course work and will be followed by the opening dinner featuring a well-known speaker who will provide insights on banking business success.

### • Day 2

All day course with a variety of sessions and activities including real case studies and further exercises. You will enjoy a private museum tour followed by a private dinner highlighting the host city's best features.

### • Day 3

Concluding sessions will include exercise presentations and will bring all the lessons of the course together in a final action plan. In the evening you will dine at an exclusive London location and participate in the grand graduation ceremony and dinner with formal presentation of graduation certificates and will conclude the programme with an optional stay at the hotel, followed by complimentary breakfast on Saturday morning.

## Reactions from participants of the inaugural iGTB Oxford course

“

I found that the group activities were an excellent way of drawing in different experiences. We could tackle a particular problem in perhaps a unique way that not any of us individually would have discovered on our own.

*JD Penner, Senior Director, Cash Management and Payment Solutions, Commercial Solutions, CIBC*

## Record breaking 96% NPS for the Advanced Programme

“

It was a wonderful experience; I learnt a lot and met many interesting people.

*Henrik Lang, MD, Head of Liquidity, Global Transaction Services, EMEA, Bank of American Merrill Lynch*

“

Great experience! You've done a great job putting this programme in place, so I strongly recommend it.

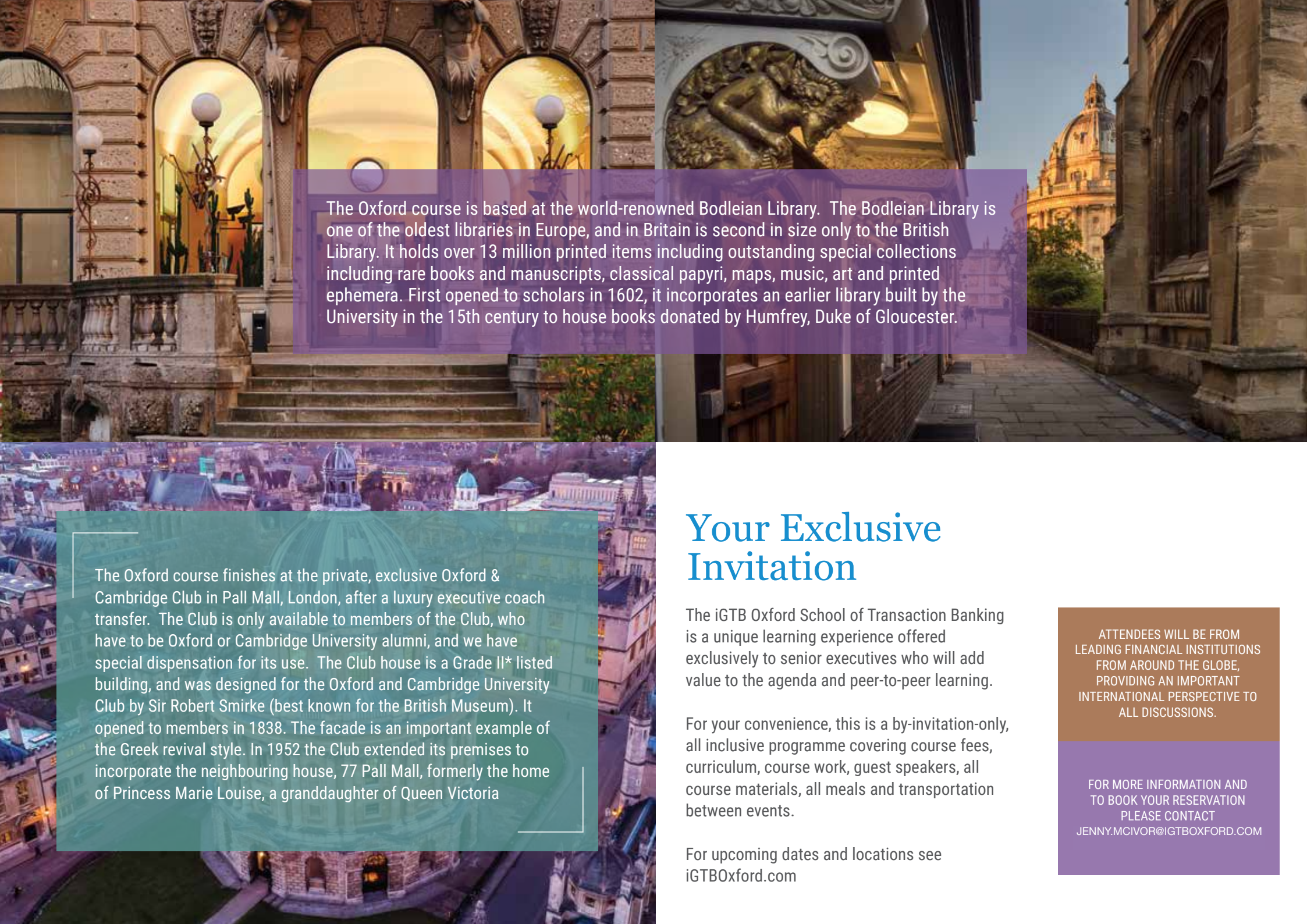
*Patrik Havander, Head of TxB Strategy & Commercial Excellence, Nordea*

“

It was amazing, it far exceeded my expectations, I got to see some of the world's leaders in transaction banking speak.

*Vipul Lalka, VP Enterprise Payments platform & Capabilities, TD Bank*





The Oxford course is based at the world-renowned Bodleian Library. The Bodleian Library is one of the oldest libraries in Europe, and in Britain is second in size only to the British Library. It holds over 13 million printed items including outstanding special collections including rare books and manuscripts, classical papyri, maps, music, art and printed ephemera. First opened to scholars in 1602, it incorporates an earlier library built by the University in the 15th century to house books donated by Humfrey, Duke of Gloucester.

The Oxford course finishes at the private, exclusive Oxford & Cambridge Club in Pall Mall, London, after a luxury executive coach transfer. The Club is only available to members of the Club, who have to be Oxford or Cambridge University alumni, and we have special dispensation for its use. The Club house is a Grade II\* listed building, and was designed for the Oxford and Cambridge University Club by Sir Robert Smirke (best known for the British Museum). It opened to members in 1838. The facade is an important example of the Greek revival style. In 1952 the Club extended its premises to incorporate the neighbouring house, 77 Pall Mall, formerly the home of Princess Marie Louise, a granddaughter of Queen Victoria

## Your Exclusive Invitation

The iGTB Oxford School of Transaction Banking is a unique learning experience offered exclusively to senior executives who will add value to the agenda and peer-to-peer learning.

For your convenience, this is a by-invitation-only, all inclusive programme covering course fees, curriculum, course work, guest speakers, all course materials, all meals and transportation between events.

For upcoming dates and locations see [iGTBOxford.com](http://iGTBOxford.com)

ATTENDEES WILL BE FROM  
LEADING FINANCIAL INSTITUTIONS  
FROM AROUND THE GLOBE,  
PROVIDING AN IMPORTANT  
INTERNATIONAL PERSPECTIVE TO  
ALL DISCUSSIONS.

FOR MORE INFORMATION AND  
TO BOOK YOUR RESERVATION  
PLEASE CONTACT  
[JENNY.MCIVOR@IGTBOXFORD.COM](mailto:JENNY.MCIVOR@IGTBOXFORD.COM)

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