# Strategic Planning for SACCOs Training Course

Professional Development Training Course Outline

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|---|---|---|---|
| **Category** | Cooperative Societies | **Duration** | 10 Days |
| **Base Fee** | $3,000 USD | **Delivery Mode** | Online / On-site Hybrid |

## Course Introduction

Strategic planning is the lifeline of any sustainable financial cooperative. For Savings and Credit Cooperative Organizations (SACCOs), a well-executed strategic plan defines not just success but longevity in a competitive financial ecosystem. Training Course on SACCOs: Strategic Planning for SACCOs equips SACCO leaders, board members, and managers with innovative tools and dynamic frameworks to craft, implement, and monitor strategies that align with their organizational goals, membership growth, and evolving financial landscapes.

In a rapidly digitizing world where financial inclusion, governance compliance, and data-driven decisions dominate, SACCOs must be proactive rather than reactive. This course enhances strategic thinking, encourages adaptive leadership, and introduces modern planning tools to help SACCOs gain competitive advantages, improve financial performance, and foster institutional resilience.

## Programme Curriculum

**Strategic Planning for SACCOs Training Course**

**Introduction**

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**Course Objectives**

Using high-impact, trending keywords:

1. Understand the core principles of strategic planning in SACCO environments.
2. Learn to conduct SWOT and PESTEL analyses for SACCO growth.
3. Align SACCO vision and mission with sustainable development goals (SDGs).
4. Develop data-driven financial growth strategies.
5. Enhance member engagement strategies for SACCO development.
6. Identify opportunities for digital transformation in SACCO operations.
7. Build capacity for strategic governance and leadership.
8. Improve risk mitigation through strategic compliance frameworks.
9. Design and manage performance indicators and KPIs for SACCOs.
10. Apply strategic tools to optimize SACCO profitability and sustainability.
11. Create market-responsive SACCO services and product strategies.
12. Utilize strategic planning to attract institutional partnerships and funding.
13. Strengthen SACCOs' ability to navigate economic uncertainty and change.

**Target Audiences**

1. SACCO board members
2. SACCO managers and staff
3. Financial cooperative regulators
4. Microfinance and cooperative consultants
5. Government cooperative officers
6. Community-based SACCO leaders
7. NGO and donor project managers working with SACCOs
8. Academic researchers in cooperative finance

**Course Duration:** 10 days

**Course Modules**

**Module 1: Introduction to Strategic Planning for SACCOs**

- Definition and importance of strategic planning
- Benefits to SACCO governance and members
- Strategic vs. operational planning
- Strategic plan components overview
- Role of leadership in strategic direction
- **Case Study**: Strategic failure vs. success – Lessons from SACCO X in Kenya

**Module 2: Vision, Mission, and Core Values Alignment**

- Crafting a strong vision and mission
- Core values that support sustainable SACCOs
- Linking values to organizational behavior
- Creating alignment across departments
- Communicating vision internally and externally
- **Case Study**: Transforming SACCO Z’s mission to increase member trust

**Module 3: Environmental Analysis Tools – SWOT & PESTEL**

- Understanding internal strengths and weaknesses
- Identifying external threats and opportunities
- PESTEL impact on SACCO operations
- Creating actionable insights from analysis

- Integrating findings into strategic objectives
- **Case Study**: How SACCO Y navigated a hostile regulatory environment

**Module 4: Strategic Goal Setting & Prioritization**

- Setting SMART goals for SACCO development
- Cascading objectives across functions
- Aligning goals with resource capacity
- Goal mapping tools and frameworks
- Monitoring and realignment techniques
- **Case Study**: Achieving 5-year expansion goals at SACCO A

**Module 5: Financial Strategy and Budget Alignment**

- Revenue growth strategies for SACCOs
- Strategic budgeting and cost control
- Financial sustainability models
- Investment strategy development
- Budget review and audit cycles
- **Case Study**: SACCO B’s turnaround using zero-based budgeting

**Module 6: Member-Centric Strategic Planning**

- Understanding member needs and expectations
- Customizing services to member segments
- Feedback loops and service innovation
- Member value proposition development
- Enhancing member loyalty and retention
- **Case Study**: SACCO C’s rise after a loyalty program rollout

**Module 7: Digital Transformation Strategy**

- Role of technology in SACCO evolution
- Digital banking and mobile SACCO apps
- Data-driven decision-making
- Cybersecurity in SACCOs
- Implementation roadmap for tech adoption
- **Case Study**: SACCO D’s leap from manual to digital in 12 months

**Module 8: Governance and Compliance Frameworks**

- Board roles in strategic execution
- Ethics and compliance policies
- Legal and regulatory adherence
- Role of internal controls
- Stakeholder accountability
- **Case Study**: Governance audit and reform in SACCO E

**Module 9: Strategic Marketing and Branding**

- Building a SACCO brand identity
- Creating strategic marketing plans
- Market segmentation and targeting
- Digital marketing for cooperatives
- Measuring marketing ROI
- **Case Study**: SACCO F’s rebranding to attract youth members

**Module 10: Human Capital Strategy**

- Workforce planning and capacity building
- Leadership development pipelines
- Strategic HR policies
- Performance management systems
- Employee engagement metrics
- **Case Study**: SACCO G's growth through leadership succession planning

**Module 11: Risk Management Strategy**

- Identifying and prioritizing SACCO risks
- Integrating risk into strategy
- Creating a risk mitigation plan
- Business continuity and crisis response
- Compliance with SACCO risk regulations
- **Case Study**: SACCO H's response to post-COVID financial risks

**Module 12: Strategic Monitoring and Evaluation (M&E)**

- Key indicators for strategic tracking
- Tools for M&E in SACCOs
- Mid-term vs. end-term evaluations
- Using dashboards and KPIs
- Reporting strategic outcomes
- **Case Study**: SACCO I's dashboard-led strategic review

**Module 13: Stakeholder Engagement and Partnership Strategy**

- Mapping SACCO stakeholders
- Designing stakeholder engagement plans
- Public-private partnership strategies
- Partner relationship management tools
- Fundraising and donor alignment
- **Case Study**: SACCO J's partnership with fintech company X

**Module 14: Innovation and Change Management**

- Fostering a culture of innovation
- Change management frameworks
- Leading SACCOs through transformation
- Encouraging intrapreneurship
- Managing resistance to change
- **Case Study**: SACCO K's internal innovation challenge

**Module 15: Strategy Execution and Institutionalization**

- Creating a strategy execution roadmap
- Roles and responsibilities for rollout
- Embedding strategy in organizational culture
- Continuous strategy refinement
- Reporting systems and dashboards
- **Case Study**: SACCO L's journey to ISO certification through strategic focus

**Training Methodology**

- Interactive lectures with real-world SACCO examples

- Group-based case study discussions and presentations
- Strategy simulation exercises and planning workshops
- Individual and team assignments using real SACCO data
- Role plays to reinforce strategic leadership principles
- Pre- and post-course assessments for impact measurement

**Register as a group from 3 participants for a Discount**

**Send us an email: info@fineskilltrainingcenter.org or call** *+254769199797*

***Certification***

*Upon successful completion of this training, participants will be issued with a globally- recognized certificate.*

***Tailor-Made Course***

*We also offer tailor-made courses based on your needs.*

**Key Notes**

**a.** The participant must be conversant with English.

**b.** Upon completion of training the participant will be issued with an Authorized Training Certificate

**c.** Course duration is flexible and the contents can be modified to fit any number of days.

**d.** The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

**e.** One-year post-training support Consultation and Coaching provided after the course.

**f.** Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

## Upcoming Scheduled Sessions

| Start Date | End Date | Location | Price |
|---|---|---|---|
| **23 Nov 2026** | 04 Dec 2026 | Online | $2,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $3,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $6,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $6,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $9,000 |

| Start Date | End Date | Location | Price |
|---|---|---|---|
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |
| **23 Nov 2026** | 04 Dec 2026 | Physical | $12,000 |

Ready to enroll or request a customized program? Book online or contact us:

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