Strategy Development for Microfinance Institutions Training Course

Professional Development Training Course Outline

Category	Microfinance & Financial Inclusion	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Microfinance institutions (MFIs) are operating in an increasingly dynamic financial ecosystem shaped by digital transformation, regulatory reforms, shifting customer expectations, and intensified competition. Strategic planning has therefore become essential for MFIs seeking sustainable growth, operational efficiency, portfolio expansion, and long-term financial resilience. Effective strategy development enables institutions to align mission-driven objectives with modern business models, digital financial services, and inclusive financial outreach while maximizing institutional value.

Strategy Development for Microfinance Institutions Training Course equips participants with the tools, frameworks, and analytical techniques necessary to design robust strategies for MFIs. It integrates practical case studies, competitive analysis, innovation frameworks, and performance insights to strengthen institutional planning. The course provides a structured approach to strategy formulation, execution, monitoring, and adaptation, enabling MFIs to respond proactively to emerging risks, market trends, and evolving customer needs across the microfinance landscape.

Programme Curriculum

Strategy Development for Microfinance Institutions Training Course

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Course Objectives

1. Understand core principles of strategic planning for microfinance institutions.
2. Analyze market dynamics using trending analytical tools and competitive intelligence.
3. Apply digital transformation strategies to strengthen MFI performance.
4. Develop mission-aligned strategic frameworks for sustainable growth.
5. Assess risks and integrate risk-based decision-making into strategic plans.
6. Strengthen portfolio strategy through customer segmentation and product innovation.
7. Utilize data-driven techniques for performance forecasting and strategic alignment.
8. Design resource allocation and investment strategies for operational efficiency.
9. Build strategic partnerships that enhance outreach and institutional capacity.
10. Establish monitoring and evaluation mechanisms for strategic execution.
11. Apply financial modelling techniques for long-term institutional planning.
12. Integrate ESG and impact-driven principles into MFI strategies.
13. Enhance change-management capabilities to support strategic transformation.

Organizational Benefits

- Improved long-term planning and institutional sustainability
- Stronger alignment of mission, vision, and operational activities
- Enhanced competitiveness through innovation and strategic positioning
- Data-driven decision-making across functional areas
- Improved financial performance and portfolio resilience
- Stronger governance and accountability structures
- Streamlined resource allocation and cost optimization
- Greater adaptability to regulatory and market shifts
- Better customer outreach and financial inclusion outcomes
- Strengthened institutional impact and long-term growth trajectory

Target Audiences

- Microfinance institution executives and managers
- Strategic planning and business development teams
- Finance, operations, and risk management officers
- Digital transformation and innovation teams
- Microfinance board members and governance officers
- Development finance and project management professionals
- Microfinance consultants and technical advisors
- Donor-funded program implementers in financial inclusion

Course Duration: 5 days

Course Modules

Module 1: Foundations of Strategy in Microfinance

- Understanding strategy and its role in MFIs
- Key drivers of institutional growth and sustainability
- Strategy levels: corporate, functional, and operational
- Linking mission and vision to strategic objectives
- Identifying constraints within MFI environments
- Case Study: Strategic failure due to misaligned institutional mission

Module 2: Market and Competitor Analysis

- Assessing market dynamics using modern analytical tools
- Identifying customer segments and underserved markets
- Competitive positioning and benchmarking
- Evaluating digital financial service trends
- Scenario analysis for market shifts
- Case Study: Market repositioning improving MFI competitiveness

Module 3: Financial and Portfolio Strategy Development

- Designing loan portfolio strategies for sustainable growth
- Asset quality evaluation and risk-weighted planning
- Revenue diversification and financial modelling
- Pricing strategies for microfinance products
- Balancing financial performance with outreach goals
- Case Study: Portfolio restructuring after rising PAR levels

Module 4: Digital Transformation and Innovation Strategy

- Leveraging digital channels for MFI expansion
- Integrating fintech partnerships and digital ecosystems
- Technology-enabled product innovation
- Improving customer experience through digital tools
- Building digital resilience and cybersecurity measures
- Case Study: Digital migration increasing operational efficiency

Module 5: Risk-Based Strategic Decision-Making

- Identifying and categorizing strategic risks
- Using risk assessment tools for planning
- Developing mitigation plans for operational, financial, and market risks
- Stress-testing strategic options
- Strengthening internal controls and governance systems
- Case Study: Risk-driven strategy averting institutional crisis

Module 6: Organizational Capacity and Resource Planning

- Assessing internal capabilities and resource gaps
- Human capital strategy and staff development planning
- Budgeting and resource allocation techniques

- Building high-performance teams to support strategy
- Aligning structure with institutional goals
- Case Study: Organizational restructuring to meet strategic objectives

Module 7: Strategy Execution, Monitoring, and Evaluation

- Translating strategy into action plans
- KPIs, scorecards, and monitoring frameworks
- Evaluating progress and addressing gaps
- Strategy review meetings and performance dialogues
- Using data analytics for strategic adjustments
- Case Study: Strategy execution delays due to weak monitoring systems

Module 8: Leading Strategic Change in MFIs

- Change-management principles for microfinance institutions
- Engaging staff and stakeholders in strategic transitions
- Communication strategy for successful implementation
- Overcoming resistance to organizational change
- Building a culture of continuous improvement
- Case Study: Change-management failure impacting strategy rollout

Training Methodology

- Instructor-led presentations and conceptual briefs
- Practical group exercises and strategy simulations
- Case study reviews with real-world MFI scenarios
- Interactive discussions and peer learning
- Templates and tools for strategic planning
- Continuous feedback sessions and reflective learning

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	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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