Value planning worksheet

When securing buy-in to attend the schools, it's important to demonstrate how your attendance will directly impact your role and your bank's priorities. Use the worksheet below to identify these opportunities.

Tip: Review our curriculums and identify specific session titles that match your development goals.

Bank priority / objective 1:

How will the Commercial Lending Schools help you develop stronger lending skills to help support your bank's mission?

Choose sessions from our curriculums to demonstrate how the schools will help you achieve the above:

Finally, how do you plan on implementing your learning at your bank?

Bank priority / objective 2:

How will the Commercial Lending Schools help you develop stronger lending skills to help support your bank's mission?

Choose sessions from our curriculums to demonstrate how the schools will help you achieve the above:

Finally, how do you plan on implementing your learning at your bank?

VALUE PLANNING WORKSHEET

Bank priority / objective 3:

_____

_____

How will the Commercial Lending Schools help you develop stronger lending skills to help support your bank's mission?

_____

_____

Choose sessions from our curriculums to demonstrate how the schools will help you achieve the above:

_____

_____

Finally, how do you plan on implementing your learning at your bank?

_____

_____

Next step

Use this worksheet, the manager discussion guide and the justification letter to help shape your conversation with your approver.