

PURPOSE

The aim is to identify the working order, activities and characteristics of the companies in the portfolio in order to maximise profits. By the end of the course, participants will have gained significant knowledge in these areas.

WHO CAN PARTICIPATE?

This training is particularly beneficial for those working in the banking marketing sector. The seminar is aimed at those wishing to learn effective portfolio management techniques. Each topic is supported by real-world examples encountered in practice.

CONTENT

What is a Portfolio?

Volume,
Profitabilit
y,
Efficiency

Goals and Strategy

Portfolio Criteria
Business Plan
Customer Segmentation
Product Ownership
Active Customer

CASE STUDY 1

Performance and
Profitability Report Card
Performance
Customer
Profitability

LPR Training Balance Sheet Analysis Techniques and Methods for Detecting Off-Balance Sheet Items

New Customer Acquisition and Customer Deepening

Sector Reviews
Industry Reviews
Sample sector and business line analyses

Strategy Map Creation

Scope of Work Active
Products
Creating a strategy map General
analysis and sub-layers

CASE STUDY 2

Strategic Portfolio
Management Pareto
Principle Work stages
Results

CASE STUDY 3

Maximising Profitability and Increasing Market Share
Methods for Reducing Costs
Methods for increasing revenues

CASE STUDY 4-5-6-7

Customer Types:

- Easy
- Medium
- Difficult

Hinterland Analysis, Customer Focus and Pricing

Hinterland Analysis Studies New
Customer Acquisition Sample
Pricing Studies

Company Visits and Sales Opportunities from Financial Data

Considerations Activity Cycle
Determining Financing Needs
Sales Opportunities from Financial
Data Limit Determination Methods

CASE STUDY 8-9

Opportunity Management

CASE STUDY 10-11

Training Date	Friday, 23 January 2026 Saturday, 24 January 2026
Virtual Classroom Application	Microsoft Teams
Virtual Classroom	
Start-End Time	10:00 - 16:00

TRAINER



Tanju Eski

LPR MANAGEMENT, TRAINING & CONSULTING

CURRICULUM

He worked in New York, USA, for approximately 15 years between 1992-1995 and 2000-2010. He developed his expertise in the US market. Between 1996 and 2000, he was responsible for the Corporate Marketing and Foreign Operations Departments at Pamukbank T.A.Ş. General Management, and also took on active responsibility for the bank's restructuring in collaboration with Mc Kinsey Co. He was responsible for the recruitment, training and coordination of marketing staff working in the Marketing Department's Branch, Regional and Head Office units. He monitored the marketing activities of financial products for Turkey's leading corporate companies, setting the Bank's numerical targets and ensuring they were declared and implemented across all units. In the Foreign Operations Department, he was responsible for managing the units where foreign operations were carried out, conducting performance evaluations of all employees, providing operational and regulatory support to the Bank's foreign operations units, and advising companies on export and import transactions. Yapı ve Kredi Bankası A.Ş.

He served as an inspector between 1987 and 1992. He studied business administration at Baruch College in New York, USA. He completed a master's degree in money and banking at the Faculty of Economics, Istanbul University. He graduated from the Department of Business Administration, Faculty of Political Sciences, Ankara University in 1986. He has a good command of English.