



Consulting and Training | Reach New Heights

Course Name

Investor Targeting and Engagement

Sector Name

Finance, Accounting and Banking

Document Type

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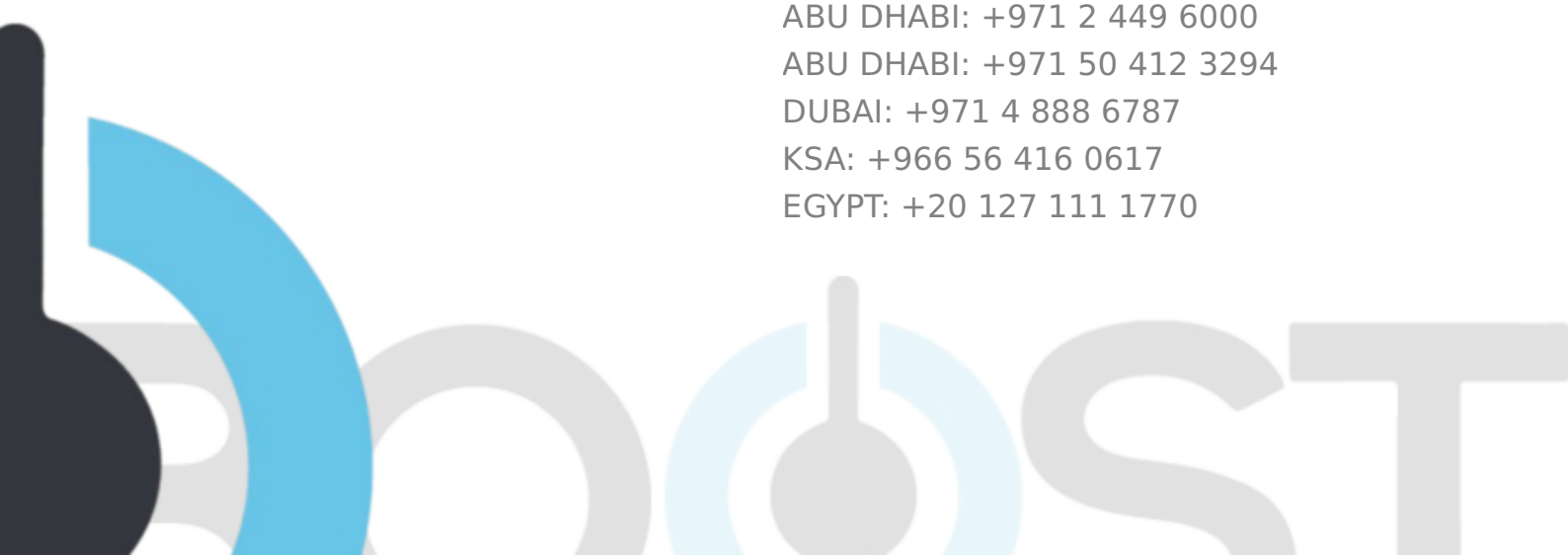
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Investor Targeting and Engagement

Course Introduction

In today's competitive investment landscape, attracting investors is no longer about broadcasting financial information—it is about targeting the right investors and building meaningful, trust-based engagement. Organizations that fail to understand investor profiles, expectations, and engagement dynamics often struggle to secure long-term investment interest and credibility.

Developed by **Boost**, this course focuses on the strategic and practical aspects of investor targeting and engagement, equipping participants with the skills to identify suitable investor segments, communicate value effectively, and manage investor relationships throughout the engagement lifecycle.

Boost's Investor Targeting and Engagement - Intermediate course bridges the gap between investment strategy and real-world investor interaction, enabling professionals to engage investors with clarity, confidence, and purpose.

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Investor Targeting and Engagement

Target Audience

- ✓ Investor relations professionals
- ✓ Strategy and business development teams
- ✓ Finance and corporate planning professionals
- ✓ Mid-level managers involved in investment initiatives
- ✓ Professionals engaging with current or potential investors

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Learning Objectives

- ✓ Understand the principles of effective investor targeting
- ✓ Segment and prioritize investors based on strategic fit
- ✓ Craft engagement approaches aligned with investor expectations
- ✓ Communicate value propositions clearly and professionally
- ✓ Manage investor interactions across different engagement stages
- ✓ Strengthening long-term investor relationships and credibility

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Investor Targeting and Engagement

Course Outline

✓ DAY 01

Understanding Investors and the Investment Landscape

Module 1: The Modern Investment Environment

- ✓ Evolution of investor expectations
- ✓ Types of investors and investment objectives
- ✓ Competitive investment landscapes

Module 2: Investor Mindsets and Decision Drivers

- ✓ How investors evaluate opportunities
- ✓ Risk, return, and strategic alignment
- ✓ Common investor concerns and expectations

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Course Outline

✓ Day 02

Investor Targeting Strategy

Module 3: Defining Ideal Investor Profiles

- ✓ Strategic vs. financial investors
- ✓ Institutional, private, and individual investors
- ✓ Matching investors with organizational goals

Module 4: Investor Segmentation and Prioritization

- ✓ Segmentation criteria and frameworks
- ✓ Assessing investor relevance and potential
- ✓ Building a targeted investor pipeline

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Course Outline

✓ Day 03

Value Proposition and Messaging

Module 5: Crafting Compelling Investment Narratives

- ✓ Translating strategy into investor language
- ✓ Aligning value propositions with investor interests
- ✓ Balancing ambition, realism, and credibility

Module 6: Communication Channels and Engagement Tools

- ✓ Meetings, roadshows, reports, and digital channels
- ✓ Selecting the right channel for each investor
- ✓ Ensuring message consistency

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Course Outline

✓ Day 04

Managing Investor Engagement

Module 7: Investor Engagement Lifecycle

- ✓ Initial outreach and relationship building
- ✓ Maintaining engagement momentum
- ✓ Managing follow-ups and feedback

Module 8: Handling Investor Questions and Concerns

- ✓ Addressing financial, strategic, and risk-related queries
- ✓ Managing objections professionally
- ✓ Building trust through transparency

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Course Outline

✓ Day 05

Sustaining Investor Relationships

Module 9: Long-Term Investor Relationship Management

- ✓ Post-investment engagement
- ✓ Performance communication and updates
- ✓ Managing expectations over time

Module 10: Measuring Engagement Effectiveness

- ✓ Engagement success indicators
- ✓ Feedback and relationship health metrics
- ✓ Continuous improvement of investor engagement strategies

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Investor Targeting and Engagement

Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Feb. 1, 2027	Feb. 5, 2027	5 days	5950.00 \$	switzerland , Geneva
May 10, 2027	May 14, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Aug. 9, 2027	Aug. 13, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Oct. 26, 2026	Oct. 30, 2026	5 days	4250.00 \$	UAE , Dubai

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