



# علاقات المستثمرين المتقدمة وممارسات الاتصال المالي الدولية



**AGILE LEADERS**  
Training Center

16 - 20 Mar 2027  
ميلان



## علاقات المستثمرين المتقدمة وممارسات الاتصال الهالي الدولية

الرجوع: 36327\_24435 التاريخ: 16 - 20 Mar 2027 الموقع: ميلان الرسوم: Euro 5700

### Course Overview:

This course provides a complete guide for professionals seeking to excel in investor relations within today's global financial markets. With a focus on advanced investor relations, participants will delve into international investor relations practices aimed at enhancing corporate financial communications and developing strategies to attract capital. Whether dealing with investor relations for private companies, private equity investor relations, or debt investor relations, this course equips participants with the necessary tools to effectively manage investor communications, navigate legal frameworks, and design successful strategies. The course will also emphasize the creation of shareholder value, crisis communication, and corporate governance. Participants will explore various tools such as investor relations reporting systems, financial calendar development, and investor relations budgets to optimize financial disclosure practices. From mergers and acquisitions to roadshow formats, attendees will learn the most effective ways to engage with investors, analysts, and the media, enabling them to become invaluable assets to their organizations.

### Target Audience:

- Investor Relations Officers
- Corporate Communications Managers
- CFOs and Financial Analysts
- Private Equity Managers
- Corporate Governance Advisors
- Compliance Officers

### Targeted Organizational Departments:

- Investor Relations Departments
- Corporate Communications Departments
- Financial Planning and Analysis Teams
- Private Equity and M&A Divisions
- Corporate Governance Departments

### Targeted Industries:

- Financial Services
- Private Equity
- Public Companies in Global Markets
- Telecommunications
- Energy and Utilities
- Technology and Biotech

## Course Offerings:

By the end of this course, participants will be able to:

- Design and implement advanced investor relations strategies.
- Master the art of competing for capital in global markets.
- Navigate investor relations for private companies and debt investor relations.
- Develop and manage financial communications strategies.
- Ensure compliance with legal requirements such as price-sensitive information disclosure.
- Handle crisis communication in high-pressure environments.
- Build long-term shareholder loyalty and retention.

## Training Methodology:

-The training methodology includes interactive case studies and group discussions. Participants will engage in real world scenarios such as financial communications, investor roadshows, and crisis management, followed by feedback sessions. Workshops will cover quantitative and qualitative factors in investor relations, financial calendar development, and managing corporate governance during mergers. Interactive sessions will ensure participants apply investor relations tools effectively.

## Course Toolbox:

- Course Workbooks
- Financial Communication Templates
- M&A and Corporate Governance Checklists
- Crisis Communication Plans
- Shareholder Value Creation Guides
- Investor Relations Calendar Template

## Course Agenda:

### Day 1: Competing for Capital and IPO Dynamics

- Competing for Capital: Introduction to Investor Relations Topic 1:
- Why Go Public? Exploring the Benefits and Challenges Topic 2:
- The Four Phases of Investor Relations in an IPO Topic 3:
- Investor Relations for Private Companies Topic 4:
- Private Equity Investor Relations Topic 5:
- Debt Investor Relations Topic 6:
- Discussing IPO phases and private company investor relations strategies Reflection & Review:



## Day 2: Keys to Successful Investor Relations

- Seven Keys to Successful Investor Relations Topic 1: •
- Clearly Defined Goals in Investor Relations Topic 2: •
- Importance of Senior Management Commitment to Investor Relations Topic 3: •
- Building a Flexible and Scalable Investor Relations Organization Topic 4: •
- Coordinating Financial and Strategic Communications Topic 5: •
- Investor Relations: Profiles and Job Descriptions Topic 6: •
- Reviewing the role of management and organization in successful investor relations Reflection & Review: •

## Day 3: Investor Relations Tools and Legal Requirements

- Investor Relations Tools: Contact Database and Monitoring Tools Topic 1: •
- Investor Relations Budgets and Resource Allocation Topic 2: •
- Understanding and Complying with Legal Requirements Topic 3: •
- Price-Sensitive Information and Disclosure Obligations Topic 4: •
- Periodic Financial Disclosure: Financial Accounting Information Topic 5: •
- The Convergence of Investor Relations and Corporate Communications Topic 6: •
- Evaluating tools and legal requirements for effective investor relations Reflection & Review: •

## Day 4: Best Practices in Investor Relations

- Identifying Shareholders: Legal and Technical Means Topic 1: •
- Attracting and Retaining Shareholders: Intelligent Targeting Topic 2: •
- Developing the Financial Calendar: Key Considerations Topic 3: •
- Crafting Compelling Financial and Strategic Messages Topic 4: •
- Shareholder Value Creation and Corporate Governance Topic 5: •
- Corporate Social Responsibility and Investor Relations for Employee Shareholders Topic 6: •
- Discussing strategies for shareholder retention and corporate governance Reflection & Review: •

## Day 5: Investor Relations Events and Measuring Success

- Successful Investor Relations Meetings and Roadshows Topic 1: •
- Analyst and Investor Days: Objectives and Planning Topic 2: •
- Conference Calls and Investor Relations Communication Topic 3: •
- Crisis Communication in Investor Relations: Anticipating Challenges Topic 4: •
- Quantitative and Qualitative Factors in Measuring Investor Relations Topic 5: •
- Awards and Perception Studies for Investor Relations Topic 6: •
- Assessing the success of investor relations programs and crisis communication Reflection & Review: •

## How This Course is Different from Other Investor Relations Courses:

The course stands out due to its deep dive into global investor relations practices, especially focusing on international markets and competing for capital in diverse environments. Unlike other courses, this program covers the full spectrum, from private equity to debt investor relations, and addresses mergers and acquisitions in a hands-on format. The use of case studies from global IPOs, alongside in-depth sessions on roadshows and conference calls, makes this course the perfect fit for professionals seeking to advance in this critical field.



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Training Center



## فئات الدورات التدريبية



HR TRAINING & DEVELOPMENT

دورات إدارة و تطوير الموارد البشرية



دورات إدارة و تحليل البيانات ودورات علم البيانات



دورات إدارة الجودة وتطوير العمليات



الدورات التدريبية في مجال البيئة والاستدامة



دورات التسويق وإدارة علاقات العملاء وإدارة المبيعات



دورات التدريب القانوني والمشتريات والتعاقدات



دورات الاتصال الجماهيري و السياسات والعلاقات العامة



دورات النظم السبراني ودورات تقنية المعلومات



دورات الصيانة ودورات المجالات الهندسية المتنوعة



دورات الصحة والسلامة والأمن المهني



دورات السكرتارية و إدارة المكاتب



دورات الحوكمة وإدارة المخاطر والامتثال



## فئات الدورات التدريبية



دورات معتمدة بشهادة CPD



دورات في مجالات القيادة والإدارة



دورات المهارات الشخصية وتطوير الذات



دورات المحاسبة و التمويل و دورات الإدارة  
الهائية



دورات مكتب إدارة المشاريع وإدارة المشاريع  
الرشيقة



دورات معتمدة من قبل هيئات دولية

## مدن التدريب



اسطنبول - تركيا



أمستردام - هولندا



أنقرة - تركيا



أثينا - اليونان



الرياض - المملكة العربية السعودية



الدوحة - قطر



الدار البيضاء - المغرب



الجبيل - المملكة العربية السعودية



باريس - فرنسا



المنامة - مملكة البحرين



الكويت - الكويت



القاهرة - مصر



براغ - جمهورية التشيك



بانكوك - تايلاند



بالي - جمهورية إندونيسيا



باكو - أذربيجان

## مدن التدريب



جاكرتا - جمهورية اندونيسيا



تيليسي - جورجيا



بوكيت - تايلاند



برشلونة - اسبانيا



روما - ايطاليا



دبي - الامارات العربية المتحدة



جوهانسبرغ - جنوب افريقيا



جنيف - سويسرا



شهر الشيخ - مصر



سيول - كوريا الجنوبية



سان دييغو - الولايات المتحدة  
الامريكية



زنبار - تنزانيا



طوكيو - اليابان



طشقند - اوزبكستان



طرابزون - تركيا



شيكاغو - الولايات المتحدة  
الامريكية

## مدن التدريب



كوالالمبور - ماليزيا



فيينا - النمسا



عن بعد - منصة زووم



عمان - المملكة الأردنية الهاشمية



ماربيا - اسبانيا



لندن - المملكة المتحدة



لانكاوي - ماليزيا



كيب تاون - جنوب إفريقيا



ميلان - إيطاليا



مونترال - سويسرا



مسقط - سلطنة عمان



مدريد - إسبانيا



نيس - فرنسا



نيروبي - كينيا



ميونخ - ألمانيا

# WHO WE ARE

Agile Leaders is a renowned training center with a team of experienced experts in vocational training and development. With 20 years of industry experience, we are committed to helping executives and managers replace traditional practices with more effective and agile approaches.

## OUR VISION

We aspire to be the top choice training provider for organizations seeking to embrace agile business practices. As we progress towards our vision, our focus becomes increasingly customer-centric and agile.

## OUR MISSION

We are dedicated to developing value-adding, customer-centric agile training courses that deliver a clear return on investment. Guided by our core agile values, we ensure our training is actionable and impactful.

## WHAT DO WE OFFER

At Agile Leaders, we offer agile, bite-sized training courses that provide a real-life return on investment. Our courses focus on enhancing knowledge, improving skills, and changing attitudes. We achieve this through engaging and interactive training techniques, including Q&As, live discussions, games, and puzzles.



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