

CROSS-SELLING INVESTMENT BANKING SOLUTIONS AND PRODUCTS

“Driving Strategic Advisory through Capital Markets, M&A, and Structured Finance”

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

In today’s complex financial ecosystem, corporate clients demand sophisticated investment banking services including equity and debt capital raising, M&A advisory, and structured financing solutions. This course equips relationship managers and front-line bankers with the strategic tools and technical knowledge needed to identify, package, and cross-sell investment banking products aligned to client objectives. Participants will learn how to position and integrate these offerings across sectors and lifecycle stages.

Objectives

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

- Understand the core investment banking product suite and transaction lifecycle
- Identify client opportunities across capital markets, advisory, and structured finance
- Position solutions aligned with business growth, acquisition, and funding goals
- Collaborate with product and execution teams to deliver integrated offerings
- Communicate complex structures in clear, strategic business language

Why Attend

- Gain a comprehensive understanding of investment banking offerings
- Learn how to uncover and shape advisory opportunities
- Develop confidence in engaging C-suite clients around M&A and capital markets
- Strengthen collaboration between relationship managers and product desks
- Enhance revenue generation through solution-oriented client conversations

Target Audience

This program is designed for:

- Corporate Relationship Managers
- Investment Banking Associates and Analysts
- Client Coverage Teams
- Strategic Account Managers
- Sector Specialists and Advisory Support Teams

Individual Benefits

Key competencies that will be developed include:

- Improved solution advisory skills in complex banking scenarios
- Enhanced knowledge of IB product structures and transaction flows
- Confidence in engaging clients at strategic moments of need
- Stronger communication and collaboration across banking teams
- Practical tools to build long-term value-driven relationships

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved cross-sell penetration across investment banking verticals
- Stronger alignment between coverage and product delivery teams
- Enhanced reputation as a trusted advisor to corporate clients
- Growth in non-lending, fee-generating business lines
- Repeatable frameworks to originate, structure, and pitch IB solutions

Instructional Methodology

The course incorporates:

- Real Deal Simulations – Modeling live transactions and client cases
- Workshops – Capital structure diagnostics and advisory solutions
- Team Exercises – Sector-specific solution design
- Facilitator Insights – Behind-the-scenes of real IB transactions
- Peer Reviews – Cross-functional collaboration scenarios

MAWA EVENTS

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Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable)

Training Hours: 07:30 AM - 03:30 PM Daily Format: 3-4 Modules | Breaks: 09:30 & 11:15 | Lunch: 01:00 - 02:00

Day 1: Understanding Investment Banking Core Products

- Module 1: Investment Banking Business Model & Revenue Streams (07:30 - 09:30)
 - IB vs commercial banking: risk, return, and capital allocation
 - Revenue models: fees, underwriting, spreads, and advisory
 - Key client touchpoints and value creation
- Module 2: Capital Markets Products Overview (09:45 - 11:15)
 - Equity and debt offerings (IPOs, bonds, private placements)
 - Capital structure optimization
 - When and why corporates issue
- Module 3: Mergers & Acquisitions Advisory (11:30 - 01:00)
 - M&A process, stakeholders, and value triggers
 - Buy-side vs. sell-side mandates
 - Strategic rationale, synergy analysis, and valuation

Day 2: Origination & Client Opportunity Mapping

- Module 4: Diagnosing Client Capital Needs (07:30 - 09:30)
 - Lifecycle and sector-based opportunity identification
 - Trigger events: refinancing, expansion, restructuring
 - Key metrics and diagnostics
- Module 5: IB Cross-Sell Opportunity Matrix (09:45 - 11:15)
 - Using relationship intelligence to propose IB solutions
 - Connecting treasury, risk, and capital strategy
 - Matrixing coverage for value-driven conversations
- Module 6: Sector-Specific IB Opportunities (11:30 - 01:00)
 - Sectoral nuances: industrials, TMT, real estate, energy
 - Valuation approaches and deal drivers by sector
 - Cross-border vs. domestic IB dynamics

Day 3: Structuring and Pitching Solutions

- Module 7: Deal Structuring & Syndication (07:30 - 09:30)
 - Debt vs. equity decision-making
 - Underwriting, pricing, and syndication strategies
 - Managing risk and execution complexity
- Module 8: Building Investment Banking Pitchbooks (09:45 - 11:15)
 - Storytelling with data: deal logic and rationale
 - Visualizing financials and use of proceeds
 - Building a strategic narrative for the client
- Module 9: Legal, Regulatory & Execution Considerations (11:30 - 01:00)
 - Confidentiality and insider information
 - Documentation, due diligence, and regulatory approval
 - Role of internal and external counsel

Day 4: Collaborative Selling & Execution Readiness

- Module 10: Working with Product Teams & Advisors (07:30 – 09:30)
 - Roles of coverage, product, and support functions
 - Internal handoffs, coordination, and communication
 - Cross-functional client servicing
- Module 11: Advanced Client Engagement Techniques (09:45 – 11:15)
 - Navigating CEO/CFO conversations
 - Managing difficult questions and financial objections
 - Building trust and strategic alignment
- Module 12: Post-Deal Management & Relationship Deepening (11:30 – 01:00)
 - Monitoring performance and post-deal reporting
 - Identifying follow-on opportunities
 - Relationship mapping for long-term growth

Day 5: Simulation and Strategic Application

- Module 13: Live Deal Simulation – Originate to Execute (07:30 – 09:30)
 - Sector-specific client scenario
 - Build and present an IB proposal
 - Cross-functional team preparation
- Module 14: Group Presentations & Feedback (09:45 – 11:15)
 - Present to internal “investment committee”
 - Peer and facilitator critique
 - Proposal refinement
- Module 15: Final Debrief & Certification (11:30 – 01:00)
 - Learning consolidation and future actions
 - Personal advisory development plan
 - Certificate award and wrap-up

Certification

Participants will receive a Certificate of Completion in Cross-Selling Investment Banking Solutions and Products, demonstrating mastery of strategic client engagement and integrated investment banking advisory.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

In-House / Customized Training

Interested in running this course for your team?

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