

Essentials of asset management series

We believe in learning by doing. To this end, all of our programmes are built around fun, interactive and informative simulations and activities that keep participants engaged to maximise retention. Your people leave with a skills toolkit they can apply immediately. We will work in partnership with you to tailor your programmes based on your funds, investment methodologies, reports, processes and systems. Building the programmes around your business means that the learning is transferred more effectively to the workplace.

Introduction to asset management

An experiential programme covering the key aspects of the fund management business. It is ideal for new hires and experienced staff who want to broaden their knowledge of your organisation.

Practical MS Office

On demand tools, tips and business skills in 2-5 minute micro-learning format • Excel modelling • Outlook • PowerPoint • Word



Focus on funds

Modular simulation-based programmes focusing on core products and services that your business offers • Derivatives in Fund Management • Focus on fixed income • Focus on equities

Focus on people

Practical workshops designed to enhance participants personal and interpersonal skills • Effective personal impact • Communicating with impact • Being at your best • Handling difficult conversations • Coaching and mentoring...

Introduction to asset management

Fund managers depend on their investment management, distribution and operational capabilities to deliver value for their clients.



Skills toolkit and takeaways:

- Clearly and easily summarise the range of products and solutions you provide for your clients
- Articulate how you manage money and how your approach differs from your competition
- Understand the main distribution channels for wholesale and institutional clients
- Read a prospectus and identify the key parties involved in the governance of an investment fund
- Walk through the life cycle of a trade and appreciate how all the steps fit together



Experiential activities include:

- Run a multi-asset portfolio, analysing economic and sectoral information, generating investment ideas and constructing their portfolios
- Review your product portfolio, fact sheets and publications
- Work in teams to design and pitch a new fund idea
- Run the operations for a simple fund, capturing and confirming trades, settling them in the market and ensuring all accounting and reconciliations are complete



Derivatives in Fund Management

Your people hear about or work with derivatives on a regular basis. Boost their knowledge and confidence to make them more effective and productive.



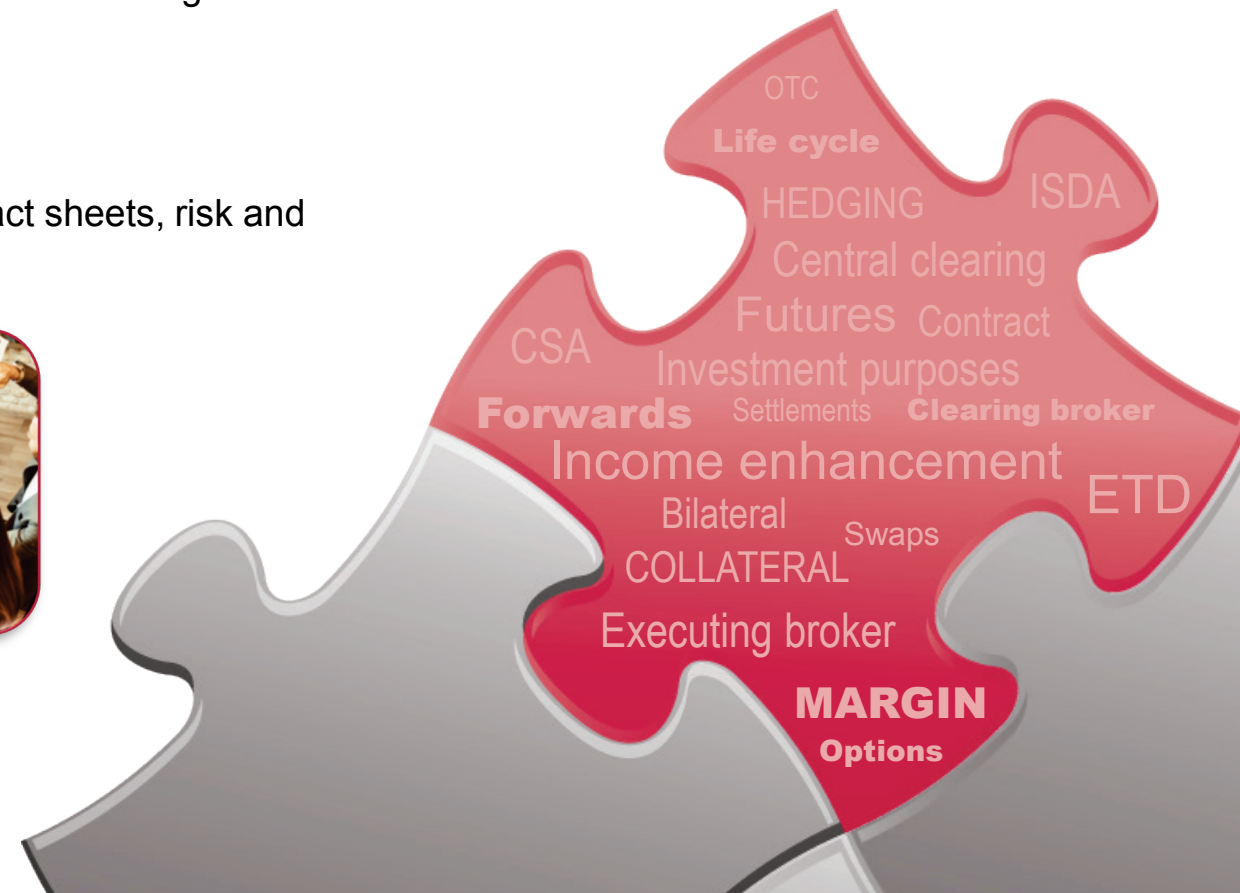
Skills toolkit and takeaways:

- Be able to use a simple framework to understand the mechanics of any derivative
- Understand how derivatives are used for hedging, income enhancement and investment purposes
- Articulate jargon in clear, simple everyday language



Experiential activities include:

- Explore specific examples of how derivatives are used in fund management generally (or in your funds in particular)
- Compete in a derivative trading game
- Step through the life cycle of a derivative trade
- Explore how the use of derivatives are reported in your fact sheets, risk and performance reports



Focus on fixed income

Understand the drivers of performance for your fixed income funds and the jargon used in the markets.



Skills toolkit and takeaways:

- Interpret research and news and its impact on the fixed income markets
- Read and understand your fixed income fact sheets and performance reports
- Replace jargon with everyday language
- Have confidence discussing fixed income with colleagues, clients and third parties



Experiential activities include:

- Run a simulated strategic bond fund, investing in government, inflation linked, investment grade and high yield bonds
- Review your fund fact sheets and performance and attribution reports to understand the metrics and language used
- Identify fixed income products to meet a range of investment objectives
- Interpret economic and asset specific research and link market events to fund performance



Focus on equities

Help your people understand how you manage equity funds for your clients and how your organisation stands out from the competition.



Skills toolkit and takeaways:

- Be able to articulate your investment process and methodology
- Understand the jargon used in the equity markets
- Have a framework to fit together the components of financial performance such as margins, return on investment, EBIT and funding
- Use powerful frameworks for analysing a company's strategic position and direction
- Be confident using your factsheets, performance reports and other information available for your clients



Experiential activities include:

- Manage a simulated equity fund, making investment decisions and seeing the impact of stock selection and portfolio construction on performance
- Practice answering clients' questions on your fact sheets and performance reports
- Team activity to analyse two well-known retailers - which stock should you buy?
- Identify the key drivers of value for companies across a range of sectors



Effective personal impact

Build a brand that helps you grow your career and develop your relationships and network. Utilise these powerful skills in everyday working life, meetings, networking and building effective business relationships.



Skills toolkit and takeaways:

- Being clear about your brand and how you stand out from the crowd
- Networking skills such as joining and leaving a conversation, establishing common ground and “park and ride”
- Using body language and tone and being aware with all five senses
- Skills of active listening
- Being aware of the “shadow” that you leave - your impact on others



Experiential activities include:

- Drafting or refining your elevator statement and getting feedback from your peers
- Attending a networking event played out with professional actors who will give real time feedback on your networking skills and approach
- Hosting a more detailed follow-up meeting to practice your new tools and insights



Communicating with impact

Communicate and present information, ideas and vision in a clear, structured and impactful way.



Skills toolkit and takeaways:

- Showing rather than telling - using visuals and digital media in the right way
- Effective techniques for planning and delivering your messages - story telling and storyboarding
- How best to ensure open and two way communication
- Being passionate and authentic in your communication
- Confidence to handle impromptu speaking opportunities



Experiential activities include:

- Collaborative team activities designed to help you explore how to effectively capture the message using mood, vision and storyboards
- Using mobile devices and technology to best effect
- One-to-one time with professional (award winning) film makers to help you deliver your message with power and impact



Being at your best

Individual and corporate productivity are improved when your people are at their best most of the time. The ability to be at your best can be life changing for individuals and transformational for organisations.



Skills toolkit and takeaways:

- Being authentic by knowing your beliefs and values
- Ability to choose your attitude and helpful versus unhelpful thinking
- Being resilient, trigger events and the clearing process
- The power of vulnerability, being open to risk and learning from failure
- Time management and prioritisation techniques



Experiential activities include:

- Short business scenario films enabling your people to identify helpful and unhelpful thinking
- Practicing the clearing process to move from unhelpful to helpful thinking
- Forum theatre role play using Emotional Intelligence to focus on your role, yourself and others
- Interactive in-tray exercise - do, delegate or discard



Handling difficult conversations

Handling difficult conversations effectively will improve the performance of all your people. See your people gain confidence, take responsibility and be accountable for dealing with challenging issues.



Skills toolkit and takeaways:

- Setting clear and structured agendas
- Driving positive outcomes through assertiveness
- Building rapport through effective use of body language, mirroring and tonality
- Managing emotional situations effectively
- Using the BOOST Model to provide constructive feedback
- Ways to ensure you achieve the required outcome



Experiential activities include:

- Forum theatre - professional actors play out various scenarios relevant to your business. Your people direct the actors (and can also step into the action if they want) to drive a positive outcome from each scenario
- Practice a challenging conversation set in the context of your business with a professional actor. Get real time feedback and see how you can improve the outcome



Tonality Confidence
Structured agenda
Building rapport
Positive outcomes
BOOST MODEL Body
ASSERTIVENESS language
Managing emotions **Difficult conversations**
Constructive feedback
Mirroring Achieving required outcome
Real time feedback
Forum theatre
Challenging conversations
Role play
Responsibility

Coaching and mentoring

Effective coaching and mentoring will transform the talent in your organisation by inspiring and motivating your people. Experience a step change in coaching and mentoring skills through the session.



Skills toolkit and takeaways:

- Effective questioning skills
- Using the four levels of listening
- Providing clear and effective feedback with the E²C² approach
- Utilising the GROW Model for coaching
- How to receive feedback



Experiential activities include:

- Practical activities with professional actors, set in scenarios relevant to a fund management workplace where you practice using your new skills toolkit
- Practical coaching and mentoring activities to enable you to experiment with new ideas in a safe simulated environment and experience the benefits first hand
- Observational video footage of workplace scenarios enabling you to explore how you would mentor and coach the people involved
- Activities focused around delivering developmental feedback in a way that ensures your messages are more likely to be acted upon by being heard
- Real time feedback from professional actors, facilitators and peers throughout



Other modules to consider



Effective delegation

Mastering delegation is a fundamental skill all managers must possess to prevent them from doing everything themselves, especially as their roles grow



Investment writing

Writing in an investment setting encompasses a diverse and complex set of modes, topics, challenges, audiences, media and writers. This session helps develop a practical investment communication skillset aligned to your fund management business



Writing with power and impact

Write in ways that address the original business needs behind each information request, and structured in ways that make the findings clear and the next steps easy to determine



Managing projects better

Build a practical understanding of the key elements of project management to help everyone to understand their role and impact in a team, and so contribute most effectively to project success



Developing your emotional resilience

Develop your emotional intelligence at work by providing an insight into managing your emotions and behaviour to maximise success in the workplace



Understanding others better using MBTI

Recognise the differences in the ways people think and react as individuals through MBTI, building interpersonal effectiveness and leading to constructive interactions with clients and colleagues



Influencing and negotiating

Reach effective business solutions by thinking, acting, influencing and negotiating in a collaborative way with colleagues to achieve sustainable success



Working collaboratively

Creating high levels of ambition and drive around your organisational values, culture and business model is key to ensuring your people work together effectively and conduct themselves in the right way



Running effective meetings

This session is designed to develop practical meeting skills that your people can utilise for everyday meetings as well as more formal meetings to ensure successful outcomes are achieved every time



Effective time management

Develop your time management skills, optimising your approach to your efficiency, effectiveness and your environment inside and outside of work



Delivering powerful presentations

Challenge your existing presentation strengths and weaknesses, and so build more effective ways to select, structure and deliver your material



Essentials of management

Apply the fundamental roles and responsibilities when managing individual and teams equipped with the essential tools of management



Practical MS Office

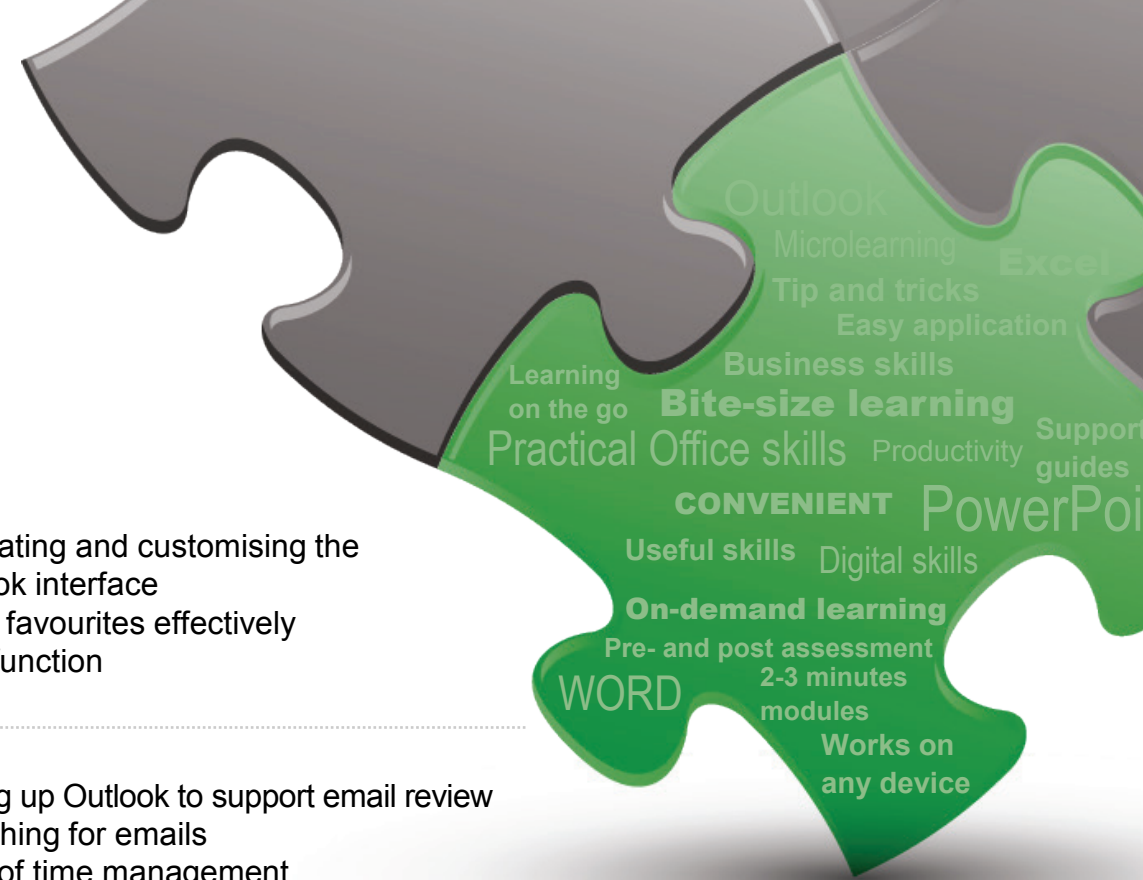
Learning delivered in a flexible digital format, that is accessible anytime and on any device or platform.

Excel modelling

Tips, tricks and shortcuts	<ul style="list-style-type: none"> • Help function and navigating Excel • Managing the workbook • Inserting, deleting, replacing • Managing data and selecting cells • Comments and tracking changes
Introductory	<ul style="list-style-type: none"> • Formatting numbers and text • Conditional formatting • Functions - Ifs, Nested Ifs, numbers (SUM, AVERAGE, MAX, MIN, COUNT), Text (CONCATENATE, CASE) • Basics of graphics and charts • Page layout and printing
Intermediate	<ul style="list-style-type: none"> • Managing Data - filters, subtotals, pivot tables, slicers, timelines, charts, validation • Functions - VLOOKUP, MATCH, INDEX, OFFSET with graphs • Formatting - Themes
Advanced	<ul style="list-style-type: none"> • Analysis - Goal seek, Solver, VBA • Form controls - Scroll Bars • VBA Form controls - Combo box • VBA - recording macros, running code, ranges, formatting, loops, variables, If statements, User defined functions

Outlook

Tips, tricks and shortcuts	<ul style="list-style-type: none"> • Navigating and customising the Outlook interface • Using favourites effectively • Help function
Introductory	<ul style="list-style-type: none"> • Setting up Outlook to support email review • Searching for emails • 4 D's of time management • Creating templates for efficiency • Automating Outlook • Flagging messages and tracking emails • Using colour categories
Intermediate	<ul style="list-style-type: none"> • The purpose of business writing • Writing effective emails • Crafting the subject line • Understanding the needs of the reader • Message length, tone and language • Personalising your message • Using short, everyday words • Using the active voice and positive tone • Avoid long sentences • Inappropriate content
Advanced	<ul style="list-style-type: none"> • The positive and negative characteristics of emails • Sending emails for the right purpose, to the right people, at the right time • Email security



Practical MS Office

Learning delivered in a flexible digital format, that is accessible anytime and on any device or platform.

PowerPoint

Tips, tricks and shortcuts

- Customising PowerPoint and working efficiently
- Help function

Introductory

- The PowerPoint interface
- Creating a presentation and applying layouts
- Principles of slide design
- Working from and applying templates
- Creating objects - lines, shapes, text
- Utilising Smart Art
- Adding hyperlinks and action buttons

Intermediate

- Creating tables
- Importing graphs and charts from Excel
- Creating and editing graphs and charts in PowerPoint
- Utilising Drawing Objects - shape styles and arranging shapes

Advanced

- Inserting media objects
- Transitions and animation
- Review, mark up and distribution
- Hiding slides
- Printing and output formats
- Delivering a presentation

Word

Tips, tricks and shortcuts

- Navigating and customising the Word
- Understanding OneDrive
- Creating and opening documents
- Saving and sharing documents

Introductory

- Text basics
- Formatting text
- Using Find and Replace
- Indents, tabs and breaks
- Line and paragraph spacing
- Lists, tables and charts
- Checking spelling and grammar
- Shapes
- Printing documents

Intermediate

- Pictures and text wrapping
- Formatting pictures
- Track changes and comments
- Inspecting and protecting documents
- Hyperlinks
- Comparing and combining documents

Advanced

- SmartArt graphics
- Applying and modifying styles
- Mail merge
- Quick styles
- Creating and running macros



Our clients include...

At MDA Training, we have 30 years experience of working with asset managers from all over the world. Find out why so many fund managers have chosen to partner with us.

