



Investor Relations and Shareholder Engagement Training Course

19 – 23 July 2027
Montreux

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Ref: 456_136733 **Date:** 19 – 23 July 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Investor Relations and Shareholder Engagement Training Course is a five-day professional course for investor relations officers, corporate communications teams, company secretariat staff, finance leaders, governance professionals, and executives supporting shareholder engagement. Participants connect investor segmentation, the equity story, disclosure coordination, earnings communications, meetings, roadshows, shareholder dialogue, feedback, activism preparedness, governance interfaces, metrics, and reporting. They leave with an Investor and Shareholder Engagement Plan. Agile Leaders Training Center delivers this course for practical market communication and accountable engagement.

Who Should Attend

- Investor relations professionals responsible for market communication and engagement calendars
- Corporate communications teams supporting results, announcements, presentations, and digital channels
- Company secretariat and governance staff coordinating shareholder rights, meetings, and board interfaces
- Finance, treasury, strategy, and sustainability leaders contributing evidence to investor messages
- Senior executives preparing for investor meetings, roadshows, results calls, and difficult questions
- Risk, legal, and compliance professionals reviewing disclosure and engagement controls

The course assumes participants support corporate communication, finance, governance, or investor engagement. It is jurisdiction-neutral and does not replace legal, regulatory, listing, or disclosure advice.

Departments and Industries

The course supports organizations that communicate with shareholders, institutional investors, analysts, and capital-market stakeholders.

- Listed companies, prospective issuers, and public joint-stock companies
- Investor relations, finance, treasury, strategy, and corporate affairs functions
- Company secretariat, governance, legal, compliance, and risk departments
- Corporate communications, media relations, sustainability, and reporting teams
- Financial institutions, infrastructure businesses, industrial groups, and service companies
- Advisory firms supporting investor communications, transactions, and shareholder meetings

Learning Objectives

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

- Segment investor and shareholder audiences and define engagement priorities
- Build an evidence-based equity story and message architecture
- Coordinate disclosure, earnings, presentation, and meeting workflows
- Plan roadshows, shareholder dialogue, feedback, and difficult-question responses
- Connect investor relations with governance, board, and company-secretariat processes
- Build an Investor and Shareholder Engagement Plan with reviewable measures

Course Agenda

Day 1: Investor Relations Strategy and Stakeholder Insight

- Investor Relations Mandate and Governance Map
- Investor, Shareholder and Analyst Segmentation
- Ownership Profile and Influence Assessment
- Engagement Objectives and Priority Matrix
- Annual Investor Relations Calendar

Day 2: Equity Story, Disclosure and Market Messages

- Strategy-to-Equity-Story Evidence Chain
- Investment Proposition and Message Architecture
- Disclosure Coordination and Approval Workflow
- Earnings Narrative and Results Presentation Pack
- Consistency Check Across Reports and Channels

Day 3: Meetings, Roadshows and Shareholder Dialogue

- Investor Meeting and Roadshow Design
- Briefing Notes and Executive Preparation
- Question Bank and Response Boundaries
- Shareholder Meeting Participation and Communication
- Meeting Records, Commitments and Follow-Up Log

Day 4: Feedback, Activism and Governance Interfaces

- Investor Perception and Feedback Capture
- Market Concern and Sentiment Theme Analysis
- Shareholder Activism Preparedness Scenario
- Board and Company Secretary Reporting Interface
- Escalation, Confidentiality and Conduct Controls

Day 5: Engagement Performance and Integrated Planning

- Suggested Exercise: Segment Investors and Set Priorities
- Suggested Exercise: Build an Equity Story Evidence Map
- Suggested Exercise: Prepare an Investor Meeting and Question Bank
- Suggested Exercise: Review Feedback and Governance Escalation
- Capstone Exercise: Investor and Shareholder Engagement Plan

Practical Exercises

The course uses suggested activities to connect corporate evidence, audience needs, controlled communication, governance, and measurable engagement.

- Suggested activity: map shareholders, institutional investors, analysts, and other capital-market audiences by information needs, influence, relationship status, and engagement priority.
- Suggested activity: convert strategy, performance, risks, capital allocation, and sustainability evidence into a consistent equity story and message framework.
- Suggested activity: prepare a meeting brief, likely question bank, response boundaries, record template, and follow-up actions for an investor discussion.
- Suggested activity: combine the engagement calendar, channel plan, governance responsibilities, feedback process, escalation routes, and measures in the capstone plan.

FAQs

What does investor relations and shareholder engagement cover?

Investor relations and shareholder engagement cover audience insight, disclosure coordination, financial and strategic communication, meetings, roadshows, shareholder participation, feedback, governance interfaces, executive preparation, and performance review.

How is an equity story built?

An equity story connects the organization's strategy, market context, operating model, performance drivers, capital allocation, risks, governance, sustainability priorities, and evidence of execution in a clear and consistent message architecture.

How should investor meetings be prepared?

Preparation should define the audience, objective, permitted information, evidence, speakers, likely questions, response boundaries, meeting record, commitments, follow-up owners, and escalation route for issues that cannot be answered immediately.



How is shareholder feedback used without compromising confidentiality?

Teams can aggregate themes, distinguish facts from perceptions, restrict sensitive information, record the source and context, route concerns through defined governance channels, and report trends without disclosing inappropriate personal or confidential details.

What belongs in an investor engagement plan?

An investor engagement plan should include audience segments, objectives, messages, evidence, channels, calendar, owners, approval points, meeting standards, feedback capture, escalation, board reporting, measures, and review dates.

How can investor relations performance be measured?

Measures can examine audience coverage, engagement quality, message understanding, follow-up completion, recurring concerns, response discipline, ownership insight, executive readiness, reporting timeliness, and actions arising from feedback.

Conclusion

Participants leave with an Investor and Shareholder Engagement Plan containing a stakeholder map, engagement priorities, equity story, disclosure workflow, earnings communication plan, meeting standards, question bank, feedback process, activism scenario, governance interfaces, measures, and review calendar. The plan turns disconnected communications into a coordinated and traceable engagement system. It supports consistent messages, informed dialogue, disciplined follow-up, and accountable reporting.