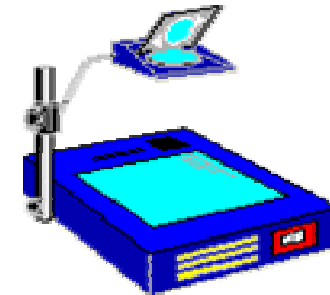




# Beyond the Basics

## Career Growth Workshops





*"Clients are becoming much more sophisticated in their products, services and performance requirements."*

## **Beyond the Basics Workshops**

*Give your Executives an edge*



## The Need

In a world of constant change, continuous learning is not an option. It is the only way to make sure you stay competitive. Professional training need not be the privilege of a few but can be the hope of everyone. It is an essential tool to turn one's hope into one's reality.

To be a perfect manager capable of delivering in today's competitive environment, you have to constantly seek information, indulge in economic discussions, understand real life planning, learn managing the emerging risks and so on.



## **The Need**

Finance is the focal point for managerial attention, decision making, and accountability. The role of finance is all pervasive and has impacts on the managerial decision of non-finance activities. It is, therefore, highly desirable that all managers irrespective of the area of operation must develop an understanding of the objectives, tools, and functions of finance.

In the absence of such understanding, the executives from other departments are not able to utilize the results of financial analyses undertaken on behalf of their activities and thus fail to contribute to the fullest.



## **The Need**

It is important that executives/employees understand the methods utilized by finance people in making financial decision.

The programs are also structured to enhance the knowledge of non-finance executives about finance.



## **Dedicated educational programs for effective corporate Results**

We specialize in imparting training on critical corporate area of finance, financial services and up gradation of sales force and customer services to the executives of corporate in any sector.

During last five years, we have imparted training to finance and non finance executives in the various industries and helped them possess the requisite knowledge of financial planning.

**We also do corporate facilitation and advisory assignments**

**visit: [www.resourcesinvestment.com](http://www.resourcesinvestment.com)**



## **Commitment**

At Resources we are committed to professional growth of all our associates and believe that people can grow at any point of time in life, it's just the individual focus and the support that needs to be extended to them.



## **The programs**

The Programs enable the individuals, teams, and organizations smooth transition to a desired future state. Awareness as to why the knowledge and ability are needed to implement new skills and behaviors and to sustain the change.





## The programs

- ✓ Prepare participants for acceptance of change in organisational tools, systems and culture.
- ✓ Enhance their decision-making skills by integrating financial management concepts into their thinking.
- ✓ Help them communicate effectively with financial managers in your organization and learn how to ask the right questions.
- ✓ Make them understand the use of proven financial management tools to improve operating performance.
- ✓ Improve the evaluation of and justification for capital spending proposals.



## The programs

- ✓ Increase the effectiveness of managerial collaboration on business planning and decision making processes.
- ✓ Enhance knowledge of principles and methods of showing, promoting, and selling products and services.
- ✓ Update marketing strategy and tactics, product demonstration, sales techniques, and sales control systems.
- ✓ Identifying Client Needs and Closing the Deal



## Customised programs

Besides the standard workshops we also organise customised training programs to meet the specific needs of the personnel of a corporate. This is conceptualized and designed after discussing the nature of the work handled by the executives who are to participate, the **level of executives** and the **objective** which the training is expected to achieve.



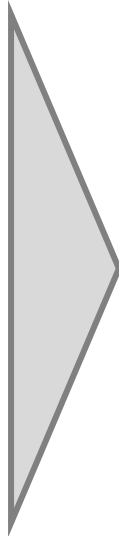
## Objective

*Using Financial Tools to Make Better Business Decisions*

1. To offer some insights into when and how a financial products is valuable for achieving the financial objectives. It also helps to focus on answers to pertinent questions those arise in the course of decision process.
2. The programs help the executives to interpret financial statements, evaluate expected rates of return on alternative projects, contribute to capital investment decisions and understand and learn the financial markets and products. The financial risk management help them plan better. The link between finance and business strategy.
3. The programs help sell services and products, and undertake counseling to customers of financial institutions and business establishments.



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**Level I**

- **Finance for Non Finance Executives**
- **Accounting and Finance Functions in an Organisation**
- **Advance Financial Planning - Time Value of Money**

**Level II- Management of Finance**

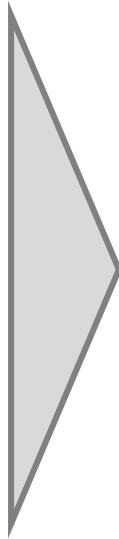
- **Financial Management Techniques**
- **Working Capital Management**
- **Financial Risk Management**
- **Merger and acquisition – introduction, strategies and valuation**

**Level II- Banking**

- **Understanding Bank's Financial Statements**
- **Management of Bank Advances**
- **Management of Treasury Portfolio**
- **Risk Rewards in Banking**



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**Level II- Capital & Money Markets**

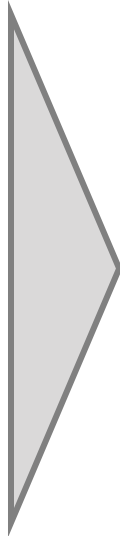
- Mutual Funds
- Wealth Management
- Management of Fixed Income Securities Portfolio

**Level II-Derivatives**

- Introduction to Derivatives – **Forwards & Futures**
- Derivatives as Hedging Tools
- Essentials of Interest Rate Futures
- Essentials of Bond & Stock Index Futures



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- Management of Bank Trade Finance
- Corporate Treasury Management
- Project Appraisal and Valuation
- Bank Branch Management - Retail Banking
- Asset Liability Management

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Other Related Topics



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To deliver to the specific needs of the personnel of a corporate, a workshop could be customized. This is conceptualized and designed after:

- ✓ discussing the nature of the work handled by the executives who are to participate,
- ✓ the level of executives and the objective which the training is expected to achieve.
- ✓ topic priorities and emphasis on market practices relevant to the day to day working.
- ✓ Weak areas and areas of concern are targeted aggressively.





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**8 to 40 hours**

With the Goal  
to enhance participant's ability in  
defining the needs and objectives and  
assess opportunities in a way that  
balances potential rewards against  
possible risk thus broadening the  
opportunity.



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**AMFI Certification:** Complete syllabus has been covered with latest developments and changes.

**The Financial Planning** (useful to people intending to pursue financial advisors profession or those associated with financial markets).

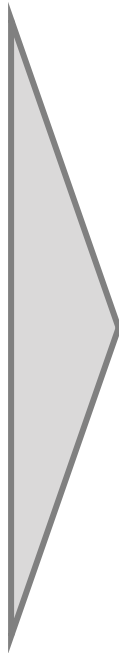
**The Risk Management** (the subject has become very important specially for professionals like corporate purchase executives and finance managers).

**The Financial Derivatives Module** (Introduction to the concept of risk management mechanism).

**Financial Management** (useful to non-financial executives /managers . This shows how the working knowledge of finance could lead to better decision taking ).



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The program combines classroom briefings, case studies, workshops, group discussions, and individual coaching.

You learn the basic concepts and implications thereof through:

- Warm up Session,
- Class room Lectures,
- Interactive Discussions and
- Case Studies,
- Questions Answers,
- Simulation Tests.
- Conceptual and Real Life examples will be discussed.

Presentation in Power Point Slides and Excel Sheets b



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The approach is to develop an understanding of

- STRATEGY
- TOOLS
- FINANCIAL REPORTS
- INVESTMENTS

&

to apply concepts such as the time value of money and cost of capital to make effective decisions and to develop a financial strategy to create competitive advantage.

After the program, you will have access to Resources' exclusive service that provides further support and advice from RME.



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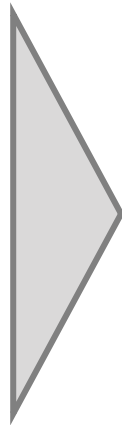
Weak areas and **areas of concern** are targeted aggressively.

The program combines classroom briefings, case studies, workshops, group discussions, and individual coaching and include:

- Warm up Session,
- Class room Lectures,
- Interactive Discussions and Case Studies,
- Questions Answers,
- Simulation Tests.



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Backed by professionals with over 25 years of experience in Finance, Capital Market, Banking and product/services Sales & Servicing, we have during last five years imparted training to executives from various corporations /mutual funds /banks etc. We have also been conducting guest lectures and training workshops for management students.



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# Resources

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We also do corporate facilitation and advisory assignments

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