

CT City Training UK



***EFFECTIVE BUSINESS WRITING
A HALF-DAY WEBINAR***

Introduction

Please find below the outline of our training programme “Effective Business Writing in Finance”. This training is focused on acquiring the skills to write an effective business report for Corporate Finance professionals.

Upon completion of this intensive course, participants will be able to:

- Understand the key sections of a business report;
- Learn how to juggle with and summarize tons of data;
- Write a powerful, straight-to-the point business report;
- Feel more comfortable presenting their findings to a senior audience.

We hope this will stimulate further discussion and provide real value to the training participants. If you have any questions, please email admin@citytraininguk.com or call +44 (0) 203 815 6530.

Why City Training UK?

Client Focus – A small London-based friendly team dedicated to its clients and tailoring courses to your business.

Experience and professionalism – Our trainers all held or are currently holding senior positions in the City, Wall Street or other leading financial centres and are talented lecturers.

Practical Programmes – Up-to-date, practical training including all the latest trends and recent case studies in your field

From heads of departments to credit analysts, recent graduate joining M&A, vice-president in private equity, middle office risk professionals, our trainers have trained thousands of professionals at the following leading institutions worldwide.

Introduction

- What are the key skills of business writing?
- Write with the reader in mind
- Summarise data in a concise manner
- Structure and organise your report
- The “so what?” test

Business Reports

- What are the different types of business reports in Corporate Finance?
 - A Corporate Finance marketing presentation
 - An investment appraisal for a private equity firm
 - An information memorandum on a potential target
 - A presentation on financing needs for an acquisition

Case Study I: Several Corporate Finance business reports are presented to participants to identify best practises

- Key sections
 - Executive summary
 - Key trends
 - Current situation assessment
 - Analysis of potential solutions/key considerations
 - Valuation analysis and financing considerations
 - Conclusion and next steps

Tips for Writing Effective Corporate Finance Reports

- Report vs. essays
 - Focus on the key financing and strategic information through bullet points
 - Each bullet needs to make a point and provide a message
 - Reader often senior management, board-level
- Planning & organizing the Corporate Finance report
 - What are the key messages underlying your M&A or financing storyline
 - What are the key sections and sub-sections?
- Achieving a logical structure and sequence
 - Start with the executive summary
 - Use of headings, sub-headings, sections, subsections and numbering
 - Logical connection between ideas
 - Focus on topic sentences (first sentence of each paragraph)
 - Sections should lead naturally into the next
- The executive summary
 - Consistent with the Corporate Finance analysis being presented
 - Exciting enough to read the details
 - Should stand on its own even if you haven't read the original report
 - Should define the problem clearly and present solutions

- Avoidance of repetition
 - Double-check section and sub-section headers
 - Ask yourself on each sentence: is this already mentioned elsewhere?
 - Make sure your work is diverse at every level
- Cross-referencing
 - Consistency in numbers and financial analysis throughout
 - Source all data & information provided
 - Use consistent format - fonts and color palette
- Using an appropriate style of writing
 - Concise, relevant accurate, descriptive vs. analytical etc
 - Word choice, sentence fluency, and writer's voice
- Use of data
 - Choose powerful graphs & tables
 - Balance proportion of charts & texts
 - Data should reinforce the page message
- Use of appendices
 - Show completeness and seriousness
 - Graphs and tables of secondary importance
 - Sensitivities on key results & analysis
 - Listing of all sources
- Use of drafts
- Report writing with multiple authors

Case Study II: Overview of well-written vs. badly written reports; practice of writing sections of a business report