

Boutique Investment Banking

Case Study

A London-based boutique M&A advisor felt their current training program did not support their analysts fully, was a little out of date and did not reflect the culture of their organization. Financial Edge was initially approached regarding a CPD program, as they were still concerned about the logistics and risk of transferring the new hire program. However, after speaking with our team, they trusted us to create an end-to-end solution.

CLIENT

**Independent / boutique
advisory firm**

PROGRAM

**New analyst entry training
program and CPD program**

LOCATION

London

PARTICIPANTS

4 new analysts

INSTRUCTORS

4 (over the space of 12 days)

Lead instructor:



Deborah Taylor

—
EX-BARCLAYS DIRECTOR

1. The Challenges



Short Notice

From the point of sign off, we had just months before training was due to start. This was a short time window to bring together a truly customized program, which accurately reflected the culture and working practices of the business.



Varied Experience

The cohort was diverse in terms of academic and work experience. Some analysts needed more support to ensure they were ready to hit the desk and work on real deals at the end of the twelve days.

2. The Solution



Collaboration & Customization

Financial Edge has years of experience creating tailored programs for firms of this size. Our team worked closely with stakeholders and subject matter experts within the business. We were given access to models and case studies to ensure the training was perfectly aligned and reflective of the deals they would work on. Throughout the planning process, we asked for regular feedback and kept open lines of communication with the L&D and front office teams.



Flexible Systems

The inclusion of adaptive pre-work in Felix was essential in setting analysts up for success. Those with a finance background could 'test and move on' while those less confident could fill skills gaps and use the anonymous 'ask the instructor' feature to request further clarification. This level of support is being maintained post-program with regular face-to-face half-day sessions, allowing the team to ask for help with issues they have encountered while being on the desk.

4

Participants

12

Days

24

CPD Sessions

STAGE 1

Adaptive pre-learning (digital, asynchronous), delivered through Felix, covering Excel basics, accounting, financial math, and modeling & valuation principles.

STAGE 2

Twelve days of in person training with four different instructors, covering professional skills, modeling and valuation, financial analysis, financing options and LBO and M&A analysis.

STAGE 3

Comprehensive year long CPD program, with two face to face half day sessions per month.

3. The Impact



High Standards Met

All our trainers were very well received by the analysts and other stakeholders within the business. Analysts felt confident working to the client's standards and supported by ongoing access to our experts. Furthermore, the business felt the training was a better reflection of their culture and appreciated our flexibility in scheduling to reduce the impact on day-to-day activities.

“Overall feedback is very positive, and we are happy we made the change.”

- HR

“Really good, covered everything and adapted to our group, quizzes helped to stay on top of the material, and exams were fair.”

- Analyst

Felix

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