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IB Networking Toolkit: Course Outline

Description: The Investment Banking Networking Toolkit trains students and professionals in the **core networking skills** required to win finance internships and investment banking interviews: informational interviews, cold emails, cold calls, weekend trips, and information sessions. Students who enroll get action plans, firm databases, and dozens of email templates, call scripts, and example timelines for all their networking needs.

Objectives: By the end of the course, students will be able to contact bankers using cold emails, cold calls, and informational interviews, build relationships, and convert these relationships into real interviews.

Target Audience: Undergraduates, MBA students, and career changers.

Duration: 10 – 15 hours.

Outline:

- **Module 1: Course Overview, Firm Database, and Networking Action Plans (1.5 Hours)** – In this introductory module, students will learn about the three main networking strategies: informational interviews, cold emails, and cold calls. This module contains 4 overview lessons and presentations, 5 action plans, and a firm database with 5,299+ investment banks, 15,887+ private equity firms, and 4,545+ hedge funds.

- **Module 2: Informational Interviews (2.0 Hours)** – These lessons teach students the step-by-step process for finding bankers, setting up informational interviews (or “coffee chats”), following up on the interviews, and converting these meetings into real interviews. This module has a tracking template, 10 email templates for informational interview requests, a preparation checklist, a “questions to ask” list, 3 sample informational interviews, and 19 email templates for following up and “making the ask.”

- **Module 3: Cold Emails (1.5 Hours)** – In this module, students learn how to use cold emails to request and win internships at smaller firms and “off-cycle” internships and jobs at large banks. The lessons contain a tracking template, 13 outreach and follow-up email templates, a preparation checklist, 3 sample calls to follow up on cold emails, and 7 follow-up email templates.

- **Module 4: Cold Calls (1.0 Hour)** – This sequence of lessons teaches students how to find boutique firms that might be receptive to cold calls and how to contact them, follow up, and reach the right person to ask about recruiting. This module provides a tracking template, 3 sample cold calls, 6 example follow-up calls, and 5 follow-up email templates.

- **Module 5: The Information Session Playbook (1.5 Hours)** – The lessons in this module explain how to use investment banking information sessions (often held by large banks on university campuses) to meet bankers and use in-person networking to win interviews and offers. The module contains a full session walkthrough "diagram," 7 follow-up email templates, 2 follow-up call examples, and 5 email templates for following up on these calls.

- **Module 6: Weekend Tips (1.0 Hour)** – This module teaches students how to visit financial centers, such as New York and London, to meet bankers, ask questions, and follow up on these meetings to win interviews. These trips are expensive and time-consuming but can be highly effective if executed properly. The lessons present 6 email templates for requesting in-person meetings, a full weekend trip sample schedule, transcripts of 2 sample meetings, and 6 email templates for following up on these meetings.

- **Module 7: The Art of Effective Email (2.0 Hours):** This module explains how to set up and use email successfully, with tips on everything from subject lines to signatures. It also provides dozens of templates for requesting informational interviews, directly asking for jobs, and staying in touch with recruiters and industry contacts.

- **Module 8: How to Use LinkedIn Effectively (1.5 Hours):** This module explains how to set up a proper LinkedIn profile and choose an appropriate photo, headline, summary, and more. It also shows students how to find and message individuals on LinkedIn, including 6 templates for short messages.

- **Module 9: Networking Success Case Studies (2.0 Hours):** This module presents 3 detailed case studies of students at the undergraduate and MBA levels who successfully networked their way into investment banking and private equity. The lessons present their overall strategies, exact timelines, example emails, and bankers' responses.

Click here to read a detailed course outline or click here to sign up instantly.