

## The Investment Banking Networking Toolkit: Course Outline

This is the condensed version of this outline. [Click Here](#) for the full version.

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BIWS IB Networking Toolkit](#)

Learn how to expand your contacts and get your foot in the door at investment banking, private equity and hedge fund interviews even if you hate “networking”.

If you’re reading this document, you’re probably considering signing up for the *Breaking Into Wall Street Investment Banking Networking Toolkit*.

If that’s you, then you should read the [full Course Outline](#) which explains...

- **Everything you get** in the Course, in detail
- **How this Course is different** from everything else available
- **How you can save money** by signing up for the lowest possible enrollment fee

Here are just a couple of the many success stories our customers have shared with us about this Toolkit:

### “Seriously, Just A Year Ago I Had No Shot, No Shot At All...”

A screenshot of an email testimonial. The email header shows "Thank you!" followed by a "Testimonials" tab with an 'x' icon. The sender's name is redacted with a black box. The recipient is "Brian". The date is "10/1/10". The body text reads: "Because of your program, I just received an offer in Citi IBD! Seriously, just a year ago I had no shot, no shot at all. Thanks to all your networking tips and all your information on your website I have finally broken into investment banking. Also your breaking into wall street guide helped immensely, all they questions that they had were on there." The text "Because of your program, I just received an offer in Citi IBD!" is underlined in red.

Thank you! Testimonials x

 10/1/10 ☆

to accounts ▾

Brian,

Because of your program, I just received an offer in Citi IBD! Seriously, just a year ago I had no shot, no shot at all. Thanks to all your networking tips and all your information on your website I have finally broken into investment banking. Also your breaking into wall street guide helped immensely, all they questions that they had were on there.

**“I Used to Think Technical Skills Were the Most Important  
to Get into the Industry. But I Was Wrong.”**

Apr 1 (2 days ago) ☆



to accounts ▾

Hi Brian,

Sure, I'm more than happy to help and here it goes.

"I used to thought technical skills is the most important to get into the industry. But I was wrong, totally. It's people and getting to know people. It's your network and how you get along with people. Brian illuminated the way to do it, and most importantly, he changed my mindset. I am not saying modeling is not important, not in any way. It's the foundation, the basics, it's what people assume you already know. Believe me, if people think you are just bullshiting, nobody will give you a hand."

By the way, after my internship in the back office, I have started another one in a proprietary commodity trading house. Doing research, not too bad! And I need to give credit to all the good people I have met, you are definitely one of them! Thank you, Brian. Really appreciate your help.

[Read More Reviews From The Investment Banking Networking Toolkit Users](#)

## The Investment Banking Networking Toolkit Course Highlights

### Module 1: Networking Overview: Mindset, Strategies & Process

- In this module, you'll learn how to think about and approach your networking at a high-level – what to do, how to approach industry contacts, and what to avoid.
- You'll also learn the processes you need to go through to develop relationships and to cold-call banks – and you'll see a sample networking schedule that a student looking for internships might follow.
- This module consists of a mix of videos and interactive, step-by-step diagrams showing you exactly what to do at each stage.

### Module 2: Lead Generation

- "Lead Generation" just means finding names and contact information for people working in whatever industry you're interested in – whether that's investment banking, private equity, or something else in finance.
- Most people make one simple mistake when it comes to finding names: they don't consider enough sources.
- You need to cast your net **very** wide if you want to have a shot at breaking in, especially in a poor economy.
- And the more unusual your ideas, the higher your chances of getting into the industry.
- In addition to all that, you'll also get names and contact information for over 3,000 banks, nearly 5,000 private equity firms, and over 2,000 hedge funds.

### Module 3: Tracking Your Networking

- When you're tracking your networking efforts, you need to update your spreadsheet every day and take action every day as well.
- But too many people start off by using ineffective or useless templates – sure, you can track every single little detail, but how much does that really matter?
- Focus on the important things – and most importantly, get used to using your tracking file properly all the time.
- We'll cover how to do all that in these lessons.

#### **Module 4: Requesting Informational Interviews**

- Once you have a name and contact information, setting up informational interviews requires a different skill set and knowledge of some specific tricks and tactics to increase your success rate.
- And it's not just setting up the actual interview that you need to know – you'll also have to understand how to follow-up appropriately and how to further develop the relationship over time.
- In this course, we cover how to write your initial email as well as 2 follow-up scenarios: one for when you don't get a response, and one for after you've spoken with someone on the phone.

#### **Module 5: Conducting Informational Interviews**

- The best way to learn how to properly conduct informational interviews is with practice. But if you don't want to make a fool of yourself on the phone or in-person first, you should pay attention to what's in this course.
- You usually need to do more preparation for informational interviews than you need for real interviews – not only could you receive all the “standard” investment banking interview questions, but you also need to research the person's background so you can ask intelligent questions.
- Depending on when it is in the recruiting season, what level you're interviewing at, and who your contact is, the informational interview may be either informal or more like a real interview. We cover both scenarios here.

#### **Module 6: Cold Calls & Cold Emails**

- Contacting strangers specifically to ask about jobs – cold-calling or cold-emailing – is an art, and the real way to get good at it is practice.
- Nevertheless, by following along with the templates, scripts, and recordings included in this course, you should be able to develop your skills and get better at it before you have to do it for real.
- Cold contact tends to work best with extremely small firms; larger banks and institutions often ignore your inquiries or are difficult to get through to.

#### **Module 7: The Information Session Playbook**

- In this course, you'll get a full "playbook" that you can use to dominate your information sessions and beat all those kids who are still in *Harold & Kumar* mode asking about "what it's like to be an investment banker."
- In addition to the high-level strategies and tactics you need to use, we'll also walk through a diagram of a sample information session and show you how to approach and how to approach them - and how to send follow-up emails that get you interviews and offers.

#### **Module 8: Becoming a Weekend Warrior**

- In this course, you'll learn everything necessary to plan and complete weekend trips that get you interviews and offers at banks.
- You'll learn the key considerations you need to take into account, the proper timing for your weekend trips, and how to maximize your productivity.

- And you'll get email templates for requesting and following up on informational interviews, as well as a sample weekend trip schedule that we'll walk through and use to explain the most important points when you're planning these trips.

### **Module 9: Networking with Co-Workers**

- You'll learn how to properly network with co-workers, how to ask for referrals and recommendations, and how to craft your own "elevator pitch" in this course.
- In addition to the high-level strategies you should be using, we'll walk you through emails and scripts for making requests of everyone from your peers to Managing Directors - and how to make what you're asking for seem like less of a big deal.
- Finally, we'll go through a sample elevator pitch and look at how you should structure your own and deliver it for maximum impact.

### **Module 10: The Practical Networking Quiz**

- Here, you'll get to test your networking knowledge and your "field experience" and see just how well you know the in's and out's of finding names and contact information, cold-calling, setting up informational interviews and weekend trips, and getting the most out of information sessions and co-worker networking.
- This 75-question quiz will test your knowledge of all these topics, and if you pass you can call yourself a true Networking Expert

### **Bonus – Module 11: The Art of Effective Email**

- In this module, you'll learn how to set up and write effective emails that will substantially boost your response rates when networking.
- You'll learn the principles, practices, and etiquette first, and then you'll get dozens of email templates you can use in different situations.
- You'll receive hours of tutorial video on how to use email effectively, as well as over 30 templates you can use in different scenarios (informational interview requests, follow-up, directly asking for internships or jobs, recruiters, and so on).

### **Bonus – Module 12: Using LinkedIn Effectively**

- In this module, you'll learn to use LinkedIn effectively for networking purposes.
- You'll start by learning how to create a proper LinkedIn profile, including what to avoid and the mistakes that result in low response rates, and you'll see real examples of both good and bad features of LinkedIn profiles.
- Then, you'll learn how to find companies and people on LinkedIn using the search function, and you'll get templates for messaging your contacts through the site's built-in messaging service.

### **Bonus – Module 13: Networking Success Case Studies**

- In this module, you'll get examples of real life networking success stories from customers and M&I readers who broke into the finance industry successfully from different backgrounds.
- You'll see the actual strategies and tactics they used, including the sequence of events, who was contacted when, and, in some cases, the exact emails that they used to win interviews and offers.
- You'll see a case study based on a reader who networked his way from a small private equity firm to a large investment bank in the UK, another one for an international student from China



who won an offer at a US-based bulge bracket bank, and then another case study from a reader at the MBA level who made a number of missteps but still managed to win an IB summer offer.

## Our Promise to You...

- ✓ **Get Immediate Access.** The instant you sign up, you'll have immediate access to 39 lessons, 13 hours of video, 30+ email templates, scripts and the **names** and **descriptions** for **4,178+ investment banks**, **11,306+ private equity firms** and **3,190+ hedge funds**.
- ✓ **365-Day Per Year Expert Support.** We have a team of experienced bankers standing by to respond to your questions, comments, and emails 365 days per year, for as long as you need.
- ✓ **Money-Back Guarantee.** *Breaking Into Wall Street* is the **first and only** IB / PE networking and financial modeling training program that comes with an **unconditional 12-month money back guarantee**.

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