Impact Investors & DFIs Engagement Strategies Training Course

Professional Development Training Course Outline

Category	Microfinance & Financial Inclusion	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Impact Investors & DFIs Engagement Strategies Training Course equips participants with practical knowledge and skills to effectively engage impact investors and development finance institutions (DFIs) for financing microfinance and financial inclusion programs. Engaging the right investors is critical for mobilizing capital, expanding operations, and achieving sustainable development goals. This course emphasizes strategies for relationship management, communication, and aligning program objectives with investor expectations.

Participants will engage in interactive workshops, hands-on exercises, and case studies to learn how to identify suitable investors, structure engagement strategies, and maintain long-term relationships. By the end of the course, participants will be able to implement investor engagement strategies that increase funding opportunities, enhance credibility, and strengthen program impact.

Programme Curriculum

Impact Investors & DFIs Engagement Strategies Training Course

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Course Objectives

1. Understand the role of impact investors and DFIs in financial inclusion
2. Identify suitable impact investors and DFI partners
3. Develop effective engagement strategies for investors
4. Align engagement with organizational goals and program objectives
5. Communicate impact and expected outcomes to investors
6. Prepare compelling presentations and proposals for investors
7. Build and maintain long-term investor relationships
8. Manage investor expectations and inquiries
9. Integrate engagement strategies with fundraising and development plans
10. Monitor and evaluate investor engagement effectiveness
11. Strengthen organizational credibility and transparency
12. Leverage investor networks for growth and partnerships
13. Gain hands-on experience in designing investor engagement plans

Organizational Benefits

- Improved access to impact investment and DFI funding
- Stronger investor relationships and trust
- Enhanced program sustainability and scale
- Increased transparency and accountability
- Evidence-based communication with investors
- Better alignment of investor priorities with program goals
- Strengthened organizational capacity for strategic engagement
- Improved funding success for financial inclusion initiatives
- Enhanced credibility with stakeholders and partners
- Capacity building in investor engagement and relationship management

Target Audiences

- MFI executives and managers
- Fundraising and development officers
- Investor relations staff
- Strategic planning and business development teams
- Finance and accounting officers
- NGO program coordinators
- Donor and investor engagement staff
- Policy and regulatory officers

Course Duration: 5 days

Course Modules

Module 1: Introduction to Impact Investors and DFIs

- Overview of impact investors and DFIs in financial inclusion
- Types and characteristics of investors
- Understanding investor expectations and priorities
- Aligning engagement with organizational strategy
- Benefits and challenges of engaging investors
- Case Study: Successful engagement with a DFI for microfinance

Module 2: Identifying Suitable Investors

- Mapping potential impact investors and DFIs
- Evaluating alignment with program objectives
- Assessing funding priorities and risk appetite
- Tools and frameworks for investor identification
- Prioritizing investors based on strategic fit
- Case Study: Investor mapping for a digital financial services program

Module 3: Engagement Strategy Design

- Developing tailored engagement strategies
- Setting clear objectives and goals
- Aligning engagement with fundraising plans
- Integrating communication and reporting frameworks
- Timing and sequencing of engagement activities
- Case Study: Designing an engagement strategy for women-focused microfinance

Module 4: Communication and Proposal Development

- Crafting compelling narratives for investors
- Structuring proposals and presentations
- Communicating expected impact and outcomes
- Visualizing performance and sustainability
- Effective messaging for different investor types
- Case Study: Proposal and pitch for an impact investor-funded project

Module 5: Relationship Management with Investors

- Building trust and credibility with investors
- Maintaining ongoing communication and updates

- Managing investor inquiries and expectations
- Long-term relationship maintenance
- Leveraging networks for partnerships and support
- Case Study: Relationship management strategies for a DFS expansion

Module 6: Monitoring and Evaluation of Engagement

- Developing KPIs for investor engagement
- Tracking engagement activities and outcomes
- Evaluating effectiveness and ROI of engagement strategies
- Lessons learned and continuous improvement
- Reporting to management and stakeholders
- Case Study: Evaluating impact of investor engagement in an MFI program

Module 7: Risk and Compliance in Investor Engagement

- Identifying potential risks in engagement strategies
- Mitigating financial, operational, and reputational risks
- Understanding regulatory and compliance requirements
- Ensuring ethical and transparent practices
- Integrating risk management into engagement plans
- Case Study: Risk assessment in impact investor engagement

Module 8: Practical Exercise: Investor Engagement Plan Development

- Designing a comprehensive investor engagement plan
- Integrating strategy, communication, and monitoring
- Peer review and feedback sessions
- Presenting engagement plans to management and stakeholders
- Applying lessons learned from case studies
- Case Study: Participants develop and present a full investor engagement plan

Training Methodology

- Interactive presentations and discussions
- Hands-on workshops and exercises
- Group case study analysis and problem-solving
- Peer review and feedback sessions
- Practical investor engagement strategy development
- Presentation and evaluation of drafted engagement plans

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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