



JAKARTA INTERNATIONAL CUSTOMER SERVICE INSTITUTE

**Customer Service Training and Quality Support
2 Days Training**



Investment Portfolio Management Training Course

OVERVIEW



Portfolio management has various areas of focus; however, the most important and common activities involve selecting and overseeing investments that meet long-term financial objectives and risk tolerance of clients. It guides SWOT analyses across the entire group of investments in order to weigh various parameters before making decisions.

The investment portfolio is reviewed and amended from time to time. Investment portfolio management is extremely useful to organisations and/or individual investors. Different investment options come with different levels of risks. Thus, multiple selective investments are mostly preferred by organisations and individual investors.

This training course will provide you with a detailed understanding and comprehensive overview of investment portfolio management, including the different types that exist today, influential factors, detailed processes, etc.

The content covers all critical aspects of investment portfolio management that should be studied and experienced by any professional aiming to build a career as an investment portfolio manager. This course will thus add immense value to your professional graph and career.



COURSE OBJECTIVES

The key objective of this Investment Portfolio Management Certification Course is to empower professionals with:

an in-depth understanding of investment portfolio management
the required experience and knowledge to undertake any role in any function within investment portfolio management and successfully meet all expectations of the role

the required foresight and analytical skills to review existing information well before making investment decisions, thereby protecting one's clients and/or organisation against risks of wrongful investments

the experience and exposure to conduct proper risk assessments and analyses before drawing conclusions regarding investment plans

the knowledge and experience to stay updated with developments in the industry to be able to alter approaches and take decisions accordingly

the dynamism to help organisations alter approaches and investment decisions, thereby also inviting greater opportunities for career growth and development

adequate knowledge, confidence and experience to train other professionals on all important aspects of investment portfolio management

a sense of pride and satisfaction in helping organisations make correct and fruitful investment decisions as per available information

the knowledge of required standards and rules to be adhered to while making investments, in turn supporting the organisation in getting structurally and legally stronger and sustainable

the overall skill set and capabilities to introduce and handle automated systems backed by technology to track investment performance, thus making one a trusted investment portfolio manager and directing further opportunities beyond one's current organisation

TRAINING METHODOLOGY

Highly experienced trainers from the relevant domain to deliver training for each of its courses. Before commencement of the course, the content is thoroughly checked and amendments are made if needed. Two-way participation is encouraged by the trainer assigning group tasks to the training group.

Role-plays and case studies enhance the method and quality of learning and training. Trainees are also asked to share related issues or experiences at their workplaces, and these are discussed with the rest of the group to encourage learning from experience and others' experiences.





ORGANISATIONAL BENEFITS

With professionals undergoing this Investment Portfolio Management Certification training course, organisations will derive the following benefits:

- Trained and experienced professionals driving investment portfolio management for your organisation and its clients
- Advanced systems and technologies to enhance the quality and speed of services, including analyses, reporting, etc.
- Regular and free-of-cost training of other employees regarding investment portfolio management
- Effective risk assessment and management, thus guiding clients with the most secure and fruitful investment decisions and building credibility in the market
- Organisational growth and development because of increased credibility and greater success in recommendations to clients
- Competitive advantage because of trained and experienced professionals providing expert advice, backed by updated technology for greater quality and efficiency
- Global exposure and recognition because of updated processes and systems helping the organisation stay relevant and capable of competing at a global platform

PERSONAL BENEFITS

Professionals opting for this Investment Portfolio Management Certification training course will benefit in the following ways:

- Complete understanding and detailed information about important aspects regarding investment portfolio management
- Greater understanding and confidence to train other professionals on investment portfolio management
- Better analytical skills to carefully assess available information before making investment recommendations, thereby contributing to organisational credibility and one's own career through good work
- Enhanced capabilities and skills to ensure updated systems and processes and advanced technology to make work smarter, faster and more accurate
- A sense of satisfaction by contributing to organisational credibility and growth and development, in turn securing good opportunities for progression within the organisation
- Adequate exposure and experience to work in any function within the investment portfolio management domain, thus gaining global exposure through various opportunities
- Better skill, experience and knowledge to carefully assess risks and take precautions to prevent losses to businesses
- Superior knowledge and understanding of all required standards and regulations in the field of investment portfolio management, ensuring that one's organisation and/or client organisations adhere to these

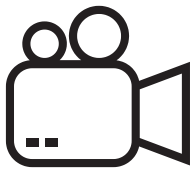




WHO IS THIS PROGRAMME FOR?

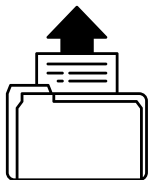
- Investment portfolio managers aiming to build a stronger, long-term career in investment portfolio management
- Other executives and managers involved at some of the other function related to investment portfolio management
- Top management of an organisation who need to be completely aware of investment and portfolio management to be able to make successful strategic decisions benefitting the organisation
- Individual investors or investment organisations who need to thoroughly understand various aspects of investment management
- Legal officers and financial advisors who should review investment decisions and post-investment progress to prevent business losses
- Any professional interested in understanding investment portfolio management more in detail

PROGRAMME HIGHLIGHTS



+60

**2+ Role Plays 5+ Real-World Case Studies 10+ Assignments/
Applications Pre-Recorded Video from JICSI with for self-
paced learning.**



**10+
Assignments/
Applications**



**5+
Real-World
Case Studies**



**2+
Role Plays**



LEARNING JOURNEY



MODULES

Module 1 : Key Elements of Portfolio Management

Module 2 : Factors Influencing Investment Portfolio Management

Module 3 : Objectives of Investment Portfolio Management

Module 4 : Types of Investment Strategies

Module 5 : Types of Investment Portfolios

Module 6 : Types of Investment Portfolio Management

Module 7 : Steps in the Portfolio Planning Process

Module 8 : Process of Investment Portfolio Management

Module 9 : Keys to Successful Investment and Portfolio Management



CERTIFICATE

Upon successful completion of the programme, participants will be awarded a digital Certificate of Completion by Jakarta International Customer Service Institute (JICSI) and Customer Service Experience Association Indonesia (CSEAI)



ABOUT JAKARTA INTERNATIONAL CUSTOMER SERVICE INSTITUTE

Jakarta International Contact Center Institute adalah suatu lembaga pelatihan dan pengadaan sumber daya manusia yang berfokus pada customer service professional dan lembaga survey kepuasan pelanggan.

Kami berorientasi pada pelanggan dimana kepuasan pelanggan adalah tujuan keberadaan kami. Kami hadir untuk pelanggan. Adapapun JICSI berdiri secara legal pada Januari tahun 2021.

Professional Training

JICSI telah melatih lebih dari 2300 peserta dan telah bekerja di berbagai perusahaan dengan keahlian mereka yang sesuai dengan kebutuhan perusahaan

Recruitment Agency

Sebelum JICSI mengirimkan tenaga yang terampil sesuai dengan yang dibutuhkan oleh perusahaan, JICSI benar- benar telah melakukan pelatihan, pembinaan dan telah lolos seleksi test yang dilakukan oleh Rumah Karir JICSI

Survey Customer Satisfaction

JICSI memiliki Survei kepuasan pelanggan sebagai alat berharga yang dapat membantu bisnis untuk menemukan tingkat kepuasan pelanggan dan menciptakan loyalitas pelanggan.

Core Value



Respect.

Kami selalu menghargai perbedaan setiap orang dan mengajak pelanggan kami untuk selalu berpartisipasi untuk memberikan masukan demi meningkatnya kualitas layanan yang akan kami berikan kepada pelanggan kami.



Honesty.

Kami selalu menjunjung akan kebenaran dalam semua situasi dan selalu mengedepankan profesionalisme yang kami miliki.



Trust.

Kami percaya kepada orang lain dan menjaga kepercayaan yang diberikan kepada kami.



Integrity.

Kami melakukan apa yang kami katakan.



Our Service.

Customer Service Training
Manpower & Recruitment Customer Service Agency
Customer Satisfaction Survey

TESTIMONI



PT Indosat Ooredoo

Training Data Visualization

[Lihat Video >>](#)



PT Indosat Ooredoo

Training Certified Contact Center Manager (CCCM)

[Lihat Video >>](#)



PT Freeport Indonesia

Training Customer Service Professional HR Call Center

[Lihat Video >>](#)



OY! Indonesia

Training Contact Center Agent Professional

[Lihat Video >>](#)

MESSAGE FROM FOUNDER

Rudy HP Manullang ,Ph.D
Founder JICSI



Menjaga hubungan yang baik dengan pelanggan adalah bagian penting untuk sukses dalam dunia bisnis. Ikatan pelanggan yang kuat dibangun dan dipelihara melalui komunikasi yang baik. Ini karena membantu pelanggan dan perusahaan membangun kepercayaan satu sama lain.

Ketika seorang customer service berbicara dengan pelanggan secara langsung, jujur, dan terbuka, customer service tersebut telah menunjukkan bahwa Anda menghargai waktu pelanggan dan mengetahui apa yang dibutuhkan oleh pelanggan. Hal ini dapat membantu membangun hubungan yang baik, yang dapat menghasilkan lebih banyak pelanggan setia dan lebih banyak bisnis yang berulang.

Dengan aktive listening dapat menjaga hubungan baik dengan pelanggan dan membantu bisnis Anda mempertahankan pelanggan setia, menghasilkan lebih banyak uang, dan mendapatkan nama baik di pasar. Mendengarkan secara aktif adalah bagian penting dalam membangun hubungan baik dengan pelanggan.

Menurut Center for Creative Leadership, pemimpin yang andal dalam skill active listening cenderung mudah mendapat kepercayaan dan hormat dari bawahannya. Oleh sebab itu, keterampilan mendengar aktif patut Anda kembangkan demi menunjang rutinitas di lingkungan kerja dalam memberikan layanan yang baik kepada pelanggan

Pelanggan cenderung nyaman berbicara dengan orang yang memang mendengarkan cerita mereka, ini termasuk kebutuhan dan masalah yang tengah dialami. Pendengar yang aktif terbiasa mendengarkan hingga tuntas dan memahami konteks pembicaraan. Barulah mengambil kesimpulan berdasarkan apa yang telah dipahami. Melalui kebiasaan ini, pelanggan jadi betah dan nyaman berbicara mengenai keluhan kesah.

OUR CLIENT





Jakarta International Customer Service Institute

Persyaratan

- Semua tingkat akademik diperbolehkan
- Pengalaman kerja
- Koneksi internet yang stabil (untuk peserta online)

Silahkan kirim berkas dokumen ke
email: **marketing@jicsi.co.id**

LOKASI

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Citragran Cibubur

Kantor 2

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