

 COURSE TUTOR INTERVIEW

# Going beyond ‘one-size-fits-all’

In this *Informed* series, the Society spoke with course tutor Lorraine Rees to get her take on what participants can expect from the ‘Investor Targeting and Engagement’ course.

## MEET THE TUTOR

Lorraine Rees is a fellow of the Institute of Chartered Accountants in England & Wales and brings over 25 years of experience in financial services and capital markets.

Before establishing IR-connect in 2016, she was director of IR for several FTSE-listed companies and previously worked as an equity analyst.

Lorraine’s broad expertise spans investor relations, capital markets, strategy, corporate finance, private equity, debt, and accounting. This combination enables her to lead wide-ranging, insightful discussions and deliver courses that are both engaging and firmly grounded in practical, real-world experience.



Lorraine Rees is managing director of IR-connect.

conversations. Feedback consistently tells us that this challenges assumptions, energises the group, and delivers insights they can apply immediately in their day-to-day work.

Overall, the course equips attendees with the tools, confidence, and strategic awareness to engage more effectively and efficiently across the full spectrum of their investor base.

## Which topics spark the most interest?



Oooh this is hard as it’s a very chatty course, and the topics that spark the most interest depend on the mix of participants, their backgrounds, and their day-to-day challenges.

That said, there are a few themes that regularly generate lively discussion. Leveraging broker relationships is a good topic as people are keen to understand how to get the most value from them in a challenging market environment.

The cost-value equation of different targeting tools and services also gets a lot of attention, especially as teams try to balance limited budgets with the pressure to be more precise in their outreach. And if participants currently have limited (or even no) existing wealth manager and retail targeting and

engagement programmes, then that is going to be a great topic for them.

There’s also strong curiosity about what’s coming next including new capabilities being developed by service providers, and how AI might change the way IR teams operate.

## How does it give a competitive edge?



This course enables participants to sharpen their IR strategy and strengthen their ability to deliver effective investor engagement. By breaking down the investor base between institutional investors, wealth managers, and retail investors, it helps delegates move beyond a ‘one-size-fits-all’ approach and develop targeted, impactful strategies. This means they can make better use of limited IR and Executive time, as well as maximising the cost–benefit of their budgets.

From a personal development perspective, the hands-on format and practical, actionable insights help build greater confidence and give participants a clear sense of what ‘good’ truly looks for an IR team.

Overall, the course elevates their capability, equips them to engage investors more intelligently, and positions them strongly in an increasingly competitive IR landscape.

## Any tips for attendees?



As with any learning opportunity, my biggest tip is to come with an open mind. And don’t be scared to get involved in the debate: this is a fun, fast-paced, discussion-driven course. There are no right or wrong answers, everyone has different experiences and valuable insights. The more you contribute, the more we all gain. ■

**Book your place for 2026 today!**

**I**nvestor Targeting and Engagement is a focused half-day Society course designed to help you understand your investors, how to engage them effectively, and what tools and strategies can support your efforts.

## What will participants gain?



They will come away with a comprehensive understanding of the breadth of today’s

investor landscape – not only large institutional investors, but also the many wealth managers and retail investors they increasingly interact with.

We explore the different strategies needed to engage each of these groups, offering practical, actionable guidance on how to tailor communication and outreach. The course includes plenty of hands-on input, real-world examples, and opportunities to share and test ideas. One of the real strengths of the session is the quality of discussion: participants bring a wide range of perspectives, which leads to lively, constructive