

## Executive Certificate Course on Innovation Project and Entrepreneurship Investment 創新項目及創業投資專業行政證書課程

25 May - 22 June 2017



# **EXECUTIVE CERTIFICATE COURSE ON INNOVATION PROJECT AND ENTREPRENEURSHIP INVESTMENT**

## **創新項目及創業投資專業行政證書課程**

### **INTRODUCTION**

Innovation and Investment is one of the most challenging tasks for start-up entrepreneurs, business executives and project managers targeting at taking off their businesses and projects.

Throughout this course, participants can get a thorough understanding of the investment and presentation techniques for successful strategy.

They can learn the features, benefits, strategies, know-how and market trends of investment, with real life applications and business cases.

Participants can also learn how to use online and offline presentation skills in developing an effective strategic plan.

A practice session is included in this program. Participants would have an opportunity to present their business case to a panel of the industry professional practitioners.

### **DESIGNED FOR**

This course is perfect for anybody responsible for planning, managing and implementing business startups and enterprises. They are looking for sources and means of pitching funds for business development. Typical attendees include start-up entrepreneurs, business executives, project owners and NGO project managers.

### **OBJECTIVES**

- To learn the issues and concerns of pitching funds for startups and business enterprises
- To learn best practices of fund raising with the support of real life business cases and practices
- To learn critical analytical skills in understanding the business cases for investment
- To learn effective presentation skills for investment

### **LANGUAGE MEDIUM**

Cantonese (supplemented with English terminology)  
Course manuals will be in English

### **DATES AND TIME**

Thursday  
25 May;  
1, 8, 15, 22 June 2017  
7:00 pm - 10:00 pm

### **FEE**

HKMA Member: HK\$2,700  
Non-member: HK\$2,900

### **VENUE**

HKMA Management Development Centre  
3/F, Tower 2, South Seas Centre  
75 Mody Road  
Tsim Sha Tsui  
KOWLOON

### **AWARD OF CERTIFICATE**

A participant who has:

1. maintained a minimum of 70% attendance of total lecture hours;
2. passed the final project

will be awarded a "Executive Certificate Course on Innovation Project and Entrepreneurship Investment."

## CONTENTS

### SWOT [Strength, Weakness, Opportunity, Threat]

1. 如何發揮及展現項目的優勢？
2. 如何有效藏拙？
3. 成功項目的特性
4. 未來商機在那裡？
5. 實踐的行動計劃及創造的威力
6. 未來商業模式及風險分析
7. 市場經濟和資源共享
8. 市場核心 SWOT 定位

### SMART [Specific, Measurable, Action-based, Realistic, Timeline]

1. 如何制定商業計劃及有效融資方案？
2. 如何利用創業、創新、傳統行業 (Teaser pages) 特出個案
3. 資本市場 (Capital Market) 及融資市場 (Finance Market) 的界定
4. 融資市場渠道：財務融資、天使基金 (Angel Fund)、風險創投 (VC)、私募基金 (PE)
5. 探討申請政府創新基金、社會發展基金及其他孵化中心平台基金的成效
6. 如何運用 SMART 有效尋找適合的投資方？
7. 新興產品眾籌平台
8. 私人公司股權、債權評估
9. 私募股權投資及退出機制

### GROW [Goal, Reality Check, Options, Will]

1. 如何有效說服投資者與你一起 GROW?
2. 投資者類別及特質：個人、團體及企業機構
3. 投資者心態及視野
4. 如何邂逅本地投資者 vs 海外知名投資者 vs 大中華投資者？
5. 由小到大，不同階段引導資金策略
6. 如何活用資金為投資股東賺取未來回報？
7. A 輪至 C 輪融資談判至上市前準備
8. 新創企業 vs 成長企業：成功及失敗個案分析

### VCP [Visibility, Credibility, Professional]

1. 如何尋找你的天使及創投投資圈？
2. 參加創業平台比賽能籌募資金嗎？
3. 製作有效媒體展示計劃及溝通工具
4. 建立個人和團隊形象及重整 VCP
5. 演繹及演說技巧
6. 提問及解難的技巧
7. 如何在三至六分鐘內打動投資者或引起對象的關注？

### UVP [Unique Value Proposition]

1. 模擬商業或非商業的個案演練
2. 現場指導分析及評估
3. 策略重整、跟進反思、不一樣的另類意見
4. 優化個案找到合適募資及投資方
5. 拆解大未來，獲取第一筆起動資金
6. 創業的 UVP 角度
7. 尋找顛覆未來的獨角獸
8. 創新投資 5 星星的奇遇旅程

## LECTURERS

### Dr Frederick Wong

Dr Wong has been involved in the financial and investment aspects of global market and funds research, investment strategies, wealth management solution, effective asset allocation, risk management and disciplined investment activities for growth opportunities. He has taught research based topics about global, emerging markets and commodities markets with strength in niche financial, economic and technical analysis. The lecturer is interested in exploring new investment decision and investment behavior with students.

Dr Wong has also conducted courses in a variety of business subjects such as Leadership, IT Management and Investment Portfolio Management. Being an instructor in different fields of industries, the lecturer is an expert in information-knowledge and management solution. He has gained extensive teaching experience as a trainer and engaged himself in part-time teaching at HKMA and in-house training for various financial services companies for over 10 years.

Dr Wong is most willing to share his valuable experience with the participants so that they may come up with practical solutions for actual daily work problems.

## ENQUIRIES

For enrolment and general enquiries, please contact the Customer Service Department on 2774-8501 or via fax 2774-8503. For course details, please contact Ms Candy Ho on 2774-8554; or visit the HKMA website: [certificate.hkma.org.hk/pdf/CB2018920171SS.pdf](http://certificate.hkma.org.hk/pdf/CB2018920171SS.pdf)

## Executive Certificate Course on Innovation Project and Entrepreneurship Investment

### 創新項目及創業投資專業行政證書課程

CB-20189-2017-1-SS 25 May - 22 June 2017

FEE: HKMA Member: HK\$2,700

Non-member: HK\$2,900

\* Applicants should include their HKID card number and fill in all details in block letters, otherwise no MDCU will be given. The Association will issue certificates based on the details and name format as given in this form.

Name (Mr/Ms) \_\_\_\_\_ (Surname) \_\_\_\_\_ (Other Names) \_\_\_\_\_ 姓名: \_\_\_\_\_ (中文)

HKID Card No.: \_\_\_\_\_ HKMA Membership No.: \_\_\_\_\_

Position: \_\_\_\_\_

Company: \_\_\_\_\_

Address of Company: \_\_\_\_\_

Nature of Business (e.g. Toy Manufacturing), please specify: \_\_\_\_\_

Job Responsibilities: \_\_\_\_\_

Telephone No. (Office): \_\_\_\_\_ (Residence): \_\_\_\_\_ Mobile: \_\_\_\_\_

Fax No.(Office/Home): \_\_\_\_\_ E-mail: \_\_\_\_\_

Correspondence Address: \_\_\_\_\_

Cheque Number: \_\_\_\_\_ Cheque Amount: HK\$ \_\_\_\_\_

Education Level:  Master or above  Bachelor  HKMA Diploma  Other Diploma

Matriculation  Form 5  Others (Please specify) \_\_\_\_\_

Total Number of Years' Working Experience \_\_\_\_\_ Years of Working Experience in Course-Related Field \_\_\_\_\_

Name & Title of Nominator (if applicable): \_\_\_\_\_

Nominator email/address: \_\_\_\_\_

Sponsorship:  Self-sponsored  Company-sponsored (please fill in the following information if a cheque/ receipt is not attached)

*Our company undertakes to pay the course fee for the above applicant*

Name of Contact Person \_\_\_\_\_

Position \_\_\_\_\_

Telephone No.: \_\_\_\_\_ E-mail: \_\_\_\_\_

Signature: \_\_\_\_\_ Company Chop and Date: \_\_\_\_\_

### From where did you FIRST learn about this Programme?

HKMA Email  Mail  Newspaper/Magazine (please specify): \_\_\_\_\_

Email Promotion from other websites (please specify): \_\_\_\_\_  Website Advertisement (please specify): \_\_\_\_\_

Search Engine (please specify): \_\_\_\_\_  Social Media (please specify): \_\_\_\_\_

HKMA Website (Where did you find this information): \_\_\_\_\_

MTR Station (please specify) \_\_\_\_\_ Exhibiton:  Jobmarket Career & Education (EJEX)  Others (please specify): \_\_\_\_\_

### DECLARATION

I authorize the HKMA to use my data to keep me informed of any direct marketing information including training and education programmes, awards and competitions, membership, alumni, promotional activities and other services and activities that it may arrange.

I consent.

I do not consent.

I understand that all handout materials obtained in class are strictly for my own educational purposes.

I have understood all the "Notes for Application" and "Notes" listed in the Application Form Annex.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- This form together with a crossed cheque payable to **The Hong Kong Management Association** should be returned to: Executive Director, The Hong Kong Management Association, 16/F Tower B Southmark, 11 Yip Hing Street, Wong Chuk Hang, Hong Kong.

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## 創新項目及創業投資專業行政證書課程

CB-20189-2017-1-SS

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## APPLICATION FORM ANNEX

### Notes for Application

- Registration must be made on the Enrolment Form provided and returned to the Association before the programme commencement date (Not less than 5 days) with full fee.
- Acceptance is subject to the discretion of the Association.
- Applicants will be notified by telephone to confirm receipt of the application form and full programme fee. An official receipt will be sent to you within two weeks.
- Applicants are expected to attend the course at the place and time specified in the brochure unless otherwise notified.
- When a programme is over-subscribed, additional classes may be started in some cases. Applicants may then be notified of the new time, dates and place of meetings when necessary.
- For ENROLMENT and ENQUIRIES please call 2774-8501 (Customer Service Department) during normal office hours or fax 2774-8503.
- No refund will be made after payment, but participants can arrange to have their places substituted should they be unable to attend the programme by notifying the Association at least 2 days prior to programme commencement.
- Fax reservations are welcome but are subject to confirmation by payment in full within 10 days of the date the reservation is made or 5 days prior to programme commencement, whichever is sooner.
- Applications, upon full payment, will be processed on a first-come first-served basis.
- Before classes/examinations commence, if the Observatory announces that Typhoon Signal No.8 or above/Black Rainstorm Warning is in force; or Typhoon Signal No.8 or above will be hoisted within 2 hours, no classes/examinations will be held. Replacement classes and remedial examinations will be arranged. (All classes will be held as scheduled if Typhoon Signal No.8 or above/Black Rainstorm Warning is lowered at or before 7:00 am; 2:00 pm classes and examinations thereafter will be held as scheduled if Typhoon Signal No.8 or above/Black Rainstorm Warning is lowered at or before 12:00 noon; 6:00 pm classes and examinations thereafter will be held as scheduled if it is lowered at or before 4:00 pm.)
- When Typhoon Signal No.8 or above is in force during classes/examinations, all classes and examinations will be dismissed immediately. Replacement classes and remedial examinations will be arranged. When Black Rainstorm Warning is in force during classes/examinations, all classes and examinations will be held as scheduled.
- The Association reserves the right to cancel a programme and/or make alterations in relation to its lecturers, contents, dates, time, venue and other particulars without prior notice.
- HKMA Website: [WWW.HKMA.ORG.HK](http://WWW.HKMA.ORG.HK)

### Notes

- I shall comply with The Hong Kong Management Association (HKMA) Privacy Policy Statement, the Hong Kong Personal Data (Privacy) Ordinance (Cap.486) and other related regulations which will be changed from time to time. I declare that the data given in support of this application are, to the best of my knowledge, true, accurate and complete. I understand that the data will be used in the admission assessment process and that any misrepresentation, omission or misleading information given may disqualify my application for admission and enrolment in the programme.
- I authorize the HKMA to obtain, and the relevant authority to release any information about my studies in institutions in Hong Kong and/or overseas.
- I understand that, upon my registration in the programme, the data will become part of my student record and may be used and processed for all lawful purposes relating to my academic and/or non-academic activities in accordance with the established policy of the HKMA and the Hong Kong Personal Data (Privacy) Ordinance (Cap.486).
- I authorize the HKMA to use my data to carry out checks on my academic status, including but not limited to multiple admission applications and records of previous studies.
- I expressly consent that the personal data will be used for the HKMA administrative, academic, research, statistical, alumni activities and prescribed purposes as allowed by HKMA and the laws of Hong Kong from time to time.
- The HKMA supports the equal opportunities policy, without discriminating against any person on the grounds of gender, disability, family status or any other basis.