

MARK 3500 Financial Services Marketing**M:** Course Objectives / Learning Outcomes

At the end of the course, the successful student should be able to:

1. demonstrate an understanding of the key concepts and the nature of financial services marketing
2. explain the importance and the challenges involved in marketing in financial institutions
3. demonstrate an understanding of consumer lifestyle and lifestage in the development of products and services
4. design marketing research, customer analysis, loyalty, acquisition and retention, and promotion initiatives for the financial services sector
5. create a set of relevant metrics for measuring marketing and corporate progress
6. utilize industry standard software to analyze marketing data and produce reports and presentations
7. develop strategies and tactics for effective marketing in the financial services industry

N: Course Content:

1. The concept of services marketing, and services marketing as it applies to financial institutions
2. Understanding and valuing the financial services customer as a key to organizational success
3. Designing products and services tailored to the target customers, respecting their risk profile and their needs
4. Integrating advertising, sales promotions, public relations and personal selling for effective marketing
5. Understanding regulations, ethics and social responsibilities.
6. Managing, defining and measuring customer satisfaction.
7. Understanding the variety of tools and resources available to comprehend, evaluate, and manage customer relations
8. The process of delivering financial services effectively and efficiently
9. Managing the financial institution's physical presence
10. The challenge of stellar website and technology design
11. People issues: managing financial institution marketing and sales staff
12. Service issues and remedial strategies
13. Customer acquisition and retention strategies: exceeding customer expectations
14. Financial services marketing planning: putting all of the elements together for seamless service

O: Methods of Instruction

The course will involve a blend of lectures, discussions, videos, cases, on-1 0 0 1 372.43 366.43 TgeB>BDC q103

R: Prior Learning Assessment and Recognition: specify whether course is open for PLAR

Yes

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Education Council / Curriculum Committee Representative

Dean / Director