A POLYTECHNIC INSTITUTION

School of Business
Program: Financial Management
Option: Financial Planning

Course Outline

Course Number: FMGT 4535
Course Name: Financial Services Marketing

Start Date:	March 22, 2005					**End Date:**	May 24, 2005		
Total Hours:	40	**Total Weeks:**	10			**Term/Level:**	4B	**Course Credits:**	2.5
Hours/Week:	4	**Lecture:**	2	**Lab:**	2	**Shop:**		**Seminar:**	**Other:**

Prerequisites

Course No.	**Course Name**
FMGT 3610	Security Analysis

Course Number: FMGT 4535 is a Prerequisite for:

Course No.	**Course Name**

v Course Description (required)

This course provides the financial planning student with the marketing and communications skills essential to success in the financial planning profession. The course covers the marketing of financial planning products and services and, in addition, it will introduce the student to the institutional environment in which many financial planners operate.

v Detailed Course Description (optional)

The goal of this course is for the financial planning student to gain basic professional selling skills with a major focus on relationship selling skills for the Financial Planning Industry.

v Evaluation

Sales Presentation (Assignment 1)	20%
Videotape & self-critique (Assignment 2)	20%
Mid-Term Exam	25%
Final Exam	25%
Participation and attendance	10%
TOTAL	100%

Comments: You are required to achieve a pass (50%) on the combined marks of the Mid-term and final exams in order to receive credit for assignments 1 and 2. Failure to achieve 50% of the available exam marks will result in a grade of zero for Assignments 1 and 2.

v Course Learning Outcomes/Competencies

Upon successful completion, the student will be able to:

1. Understand the concept of relationship selling
2. Explain the steps in the relationship selling process
3. Plan for, develop and deliver a sales presentation
4. Critique a videotape of their own sales presentation
5. Understand the techniques available for maintaining and building client relationships
6. Demonstrate effective verbal, non-verbal and written communication skills

v Verification

I verify that the content of this course outline is current.

Authoring Instructor	Date

I verify that this course outline has been reviewed.

Program Head/Chief Instructor	Date

I verify that this course outline complies with BCIT policy.

Dean/Associate Dean	Date

Note: Should changes be required to the content of this course outline, students will be given reasonable notice.

v Instructor(s)

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v Learning Resources

Required:

- One blank VHS videocassette tape (minimum length 30 minutes).
- No single text has been adopted for this course. Instead, during the course the instructor will provide several readings from selected texts and publications. Some, or all, of these readings may be provided on the course Web site or as hardcopy handouts. The content of these readings is considered examinable material.
- Visit the course Web site (see Instructor website above) at least twice per week during the course to read and keep up to date with pertinent information provided by the instructor.

Recommended:

Numerous sales and negotiation textbooks and other resources are available in, or via, the library. Students are advised to make use of them to supplement required readings and to assist in preparing assignments.

v Information for Students

(*Information below can be adapted and supplemented as necessary.*)

Assignments: Late assignments, lab reports or projects will **not** be accepted for marking. Assignments must be done on an individual basis unless otherwise specified by the instructor.

Makeup Tests, Exams or Quizzes: There will be **no** makeup tests, exams or quizzes. If you miss a test, exam or quiz, you will receive zero marks. Exceptions may be made for **documented** medical reasons or extenuating circumstances. In such a case, it is the responsibility of the student to inform the instructor **immediately**.

Ethics: BCIT assumes that all students attending the Institute will follow a high standard of ethics. Incidents of cheating or plagiarism may, therefore, result in a grade of zero for the assignment, quiz, test, exam, or project for all parties involved and/or expulsion from the course.

Attendance: The attendance policy as outlined in the current BCIT Calendar will be enforced. Attendance will be taken at the beginning of each session. Students not present at that time will be recorded as absent.

Illness: A doctor's note is required for any illness causing you to miss assignments, quizzes, tests, projects, or exam. At the discretion of the instructor, you may complete the work missed or have the work prorated.

Attempts: Students must successfully complete a course within a maximum of three attempts at the course. Students with two attempts in a single course will be allowed to repeat the course only upon special written permission from the Associate Dean. Students who have not successfully completed a course within three attempts will not be eligible to graduate from the appropriate program.

Course Outline Changes: The material or schedule specified in this course outline may be changed by the instructor. If changes are required, they will be announced in class.

v Assignment Details

Details for assignments will be provided in-class.

Schedule

Week of/ Number	Outcome/Material Covered	Assignment Due Date
1 March 22 - 26	**LEC:** Course overview, introduction to marketing tools for financial analysts, relationship selling & the marketing concept **LAB:** Guest: Overview of professional selling, keys to success, understanding communication styles	
2 Mar 29 – April 2	**LEC:** The process of building client relationships, developing a client relationship strategy, creating value, the role of ethics **LAB:** Role play: active listening	
3 April 5 - 9	**LEC: Cancelled Easter Holiday** **LAB:** Role play: uncovering client needs	
4 April 12 – 16	**LEC:** Understanding client buyer behaviour, buying motives, personality types, client needs assessment, listening skills **LAB:** Role play: planning approaches	
5 April 19 - 23	**LEC:** Creating the client presentation, presentation strategies, fitting the right presentation style to each client **LAB: Mid Term Exam**	
6 April 26 - 30	**LEC:** Negotiating client concerns, creating options for mutual gain, closing, confirming the relationship **LAB: In-class sales presentations**	**Assignment #1 (In-In-class sales presentations) per schedule**
7 May 3 – 7	**LEC:** Ongoing client servicing, building and deepening the client relationship **LAB: In-class sales presentations**	**Assignment #1 (In-class sales presentations) per schedule**
8 May 10 – 14	**LEC:** Understanding the role of gender and culture, sources for new prospects **LAB: In-class sales presentations**	**Assignment #1 (In-class sales presentations) per schedule**
9 May 17 – 21	**LEC:** Marketing tactics for building and maintaining client relationships **LAB:** Specialized topics (TBD), review of course concepts	**Assignment #2 (videotapes & self-critiques due)**
10 May 24 – 28	**Final Exam (time, date, TBA)**	

NOTE: The schedule above is tentative and subject to change in the best interest of learners. Any changes will be announced on the course Web site and/or in class.