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|--------------------|---|---------------------|-------------|--------------------|----|
| <b>Hours/Week:</b> | 4 | <b>Total Hours:</b> | 40          | <b>Term/Level:</b> | 4B |
| <b>Lecture:</b>    | 2 | <b>Total Weeks:</b> | 10          | <b>Credits:</b>    |    |
| <b>Lab:</b>        | 2 | <b>Start Date:</b>  | Mar 18/2002 |                    |    |
| <b>Other:</b>      |   | <b>End Date:</b>    | May 24/2002 |                    |    |

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**Prerequisites:**

Successful completion of FMGT 3610 Security Analysis 1.

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**Course Goals:**

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.

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**Course Description:**

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.

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**Evaluation:**

|                                    |            |
|------------------------------------|------------|
| Assignment 1: (Sales Presentation) | 20%        |
| Assignment 2: (Negotiation)        | 20%        |
| Mid-term Exam                      | 25%        |
| Final Exam                         | 25%        |
| Participation                      | 10%        |
| <b>TOTAL</b>                       | <hr/> 100% |

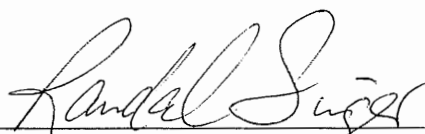
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**Course Learning Outcomes/Competencies:**

Upon successful completion of this course, the student will be able to:

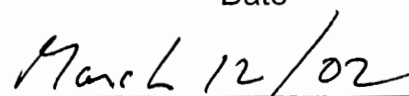
1. Explain the steps in the sales process.
  2. Develop, deliver and critique a sales presentation.
  3. Explain the steps in the negotiation process.
  4. Prepare for, conduct, and evaluate a sales negotiation.
  5. Demonstrate effective verbal, non-verbal and written communication skills.
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**Course Content Verification:**

  
\_\_\_\_\_  
Program Head/Chief Instructor

  
\_\_\_\_\_  
Associate Dean

  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Date

NOTE: Unforeseeable circumstances may necessitate the alteration of course content, sequencing, timing or evaluation. Should such changes be required, as much as possible students will be given adequate notice via the course Web site, or in class.

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**Effective Date:**

March 18, 2002

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| Instructor            | Office  | Hours     | BCIT         | e-mail           |
|-----------------------|---------|-----------|--------------|------------------|
| Randal Singer, M.B.A. | SE6-312 | As posted | 604-456-8040 | rssinger@bcit.ca |

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**Learning Resources:**

Required:

- 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 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.
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**Policy Information for Students:**

1. The attendance policy as outlined in the BCIT calendar will be followed. You are expected to be in attendance for all scheduled Lecture and Lab time. For this course, excessive absence will consist of missing more than the equivalent of four class hours (10% of total class time) for reasons within your control. Upon notification of excessive absence and failure to provide adequate explanation, you will be disqualified from writing the final exam.
  2. You are required to achieve a pass (50%) on the combined marks of the Mid-term Exam and Final Exam 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.
  3. The Mid-term exam and Final exam must be written on scheduled dates at scheduled times. Please ensure that you are available to write exams at the appointed times. A grade of zero will be recorded for a missed exam unless your absence can be excused under the terms of BCIT's attendance policy.
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4. You are required to complete and submit every assignment to successfully complete this course. Failure to complete any one assignment will result in disqualification from writing the final exam.
5. Since effective time management skills are an important success factor in business, course assignments submitted after the time and date due shall be considered late. Late penalties shall apply to items submitted after deadline. Please deliver any late submissions in person to the instructor.
6. Since a high level of written communication skills is important for success in marketing and selling, spelling, grammar and sentence construction will be considered in assigning marks to written submissions.
7. You are required to keep a back-up copy of all written submissions, and to be prepared to provide the instructor with a second copy of any submissions, upon request.
8. Case examples, role-play exercises, videos, discussion and presentations during Lectures and Labs are intended to supplement, not duplicate, course readings. The combination of readings, Lecture and Lab content will assist you to complete assignments, and shall be eligible material for all exams.
9. Your participation grade shall be based upon the degree to which you:
  - Arrive for Lectures and Labs on time,
  - Ask questions which are relevant and pre-thought,
  - Volunteer and contribute valuable ideas during class discussion,
  - Demonstrate professionalism and willingness to participate in role-plays and exercises,
  - Demonstrate your ability to focus attention on the task at hand during Lectures and Labs, and
  - Enhance the learning environment for fellow students.
10. You are expected to act professionally during class. Students disrupting classes or disturbing others during class will be asked to leave and their behaviour will be reported to their Program Head.
11. Acts of cheating, plagiarism and dishonesty are not tolerated. The degree of punitive action may range from a written warning to withdrawal from the program. These penalties may also be applied to any student who knowingly contributes to an act of dishonesty, cheating or plagiarism.
12. This course outline may assist you in the future to receive credit for all or part of a course from another post-secondary institution or from a professional program. It is strongly recommended that you keep this course outline in a safe place for future reference.
13. The material specified in this course outline may be changed by the instructor. If changes are required, they will be announced on the course Web site or in class.

**Course Map:**

| <b>Week/<br/>Date</b> | <b>Outcome/<br/>Material Covered</b>                                                                                                              | <b>Assignment/<br/>Due Date</b> |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| 1<br>Mar 18-22        | LEC: Course overview, the professional salesperson, sales process, FAB's & trial closes.<br>LAB: Role-play Approach, Probing, Needs Analysis      |                                 |
| 2<br>Mar 25-29        | LEC: , Decision-making process, objection categories, handling objections, closing<br>LAB: Role play FAB's & Trial Closes                         |                                 |
| 3<br>Apr 1-5          | LEC: Cancelled – Easter Holiday<br>LAB: Cancelled – Easter Holiday                                                                                |                                 |
| 4<br>Apr 8-12         | LEC: Prospecting and qualifying, follow-up and customer service, personality styles<br>LAB: Sales presentations                                   | Assignment 1<br>(per schedule)  |
| 5<br>Apr 15-19        | LEC: Mid-term Exam<br>LAB: Sales presentations                                                                                                    | Assignment 1<br>(per schedule)  |
| 6<br>Apr 22-26        | LEC: Negotiation process, substantive issues, interests, inventing options<br>LAB: Role-play creating climate, separating people from the problem |                                 |
| 7<br>Apr 29-May 3     | LEC: Objective criteria, BATNA/WATNA<br>LAB: Role-play exploring interests, inventing options                                                     |                                 |
| 8<br>May 6-10         | LEC: Managing concessions, Hardball tactics<br>LAB: Negotiations                                                                                  | Assignment 2<br>(per schedule)  |
| 9<br>May 13-17        | LEC: Preventing breakdowns, Considering gender and culture, Using third parties<br>LAB: Negotiations                                              | Assignment 2<br>(per schedule)  |
| 10<br>May 20-24       | Final Exam (date, time, TBA)                                                                                                                      |                                 |

**NOTE:** The Course Map above is tentative and subject to change according to the needs and interests of learners. Any changes will be announced on the course Web site or in class.