



A POLYTECHNIC INSTITUTION

School of Business  
Program: Financial Management  
Option: Financial Planning

Course Number: FMGT 4535  
Course Name: Financial Services Marketing

<b>Start Date:</b> March 19, 2007	<b>End Date:</b> May 25, 2007
<b>Total Hours:</b> 40 <b>Total Weeks:</b> 10	<b>Term/Level:</b> 4B <b>Course Credits:</b> 2.5
<b>Hours/Week:</b> 4 <b>Lecture:</b> 2 <b>Lab:</b> 2	

**Prerequisites**

<b>Course No.</b>	<b>Course Name</b>
FMGT 3610	Security Analysis

**Course Number: FMGT 4535 is a Prerequisite for:**

<b>Course No.</b>	<b>Course Name</b>
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**v Course Description**

This course provides the financial planning student with the marketing, sales and communications skills essential to success in the financial planning profession. The course covers the marketing and sales 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**

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**

Midterm Exam	25%
Final Exam	25%
Group Financial Planning Presentation	15%
In Lab Sales Presentation	25%
Participation and Attendance	10%
<b>TOTAL</b>	<b>100%</b>

**NOTE: Failure to achieve 50% or more on the combination of the exams (midterm and final), and the individual assignments, will require 0 % being assigned for all other group projects and assignments, resulting in a failing grade for this course.**

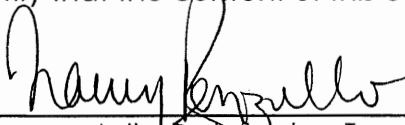
**v Course Learning Outcomes/Competencies**

Upon successful completion, the student will be able to:

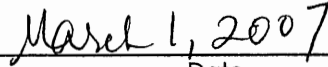
1. Understand the concept of relationship selling
2. Explain the steps in the relationship selling process
3. Plan for, develop and deliver a sales presentation
4. Critique a videotape of their own sales presentation
5. Understand the techniques available for maintaining and building client relationships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

**v Verification**

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



Authoring Instructor - Tracey Renzullo

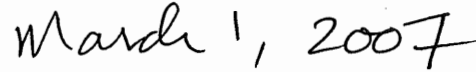


Date

I verify that this course outline has been reviewed.

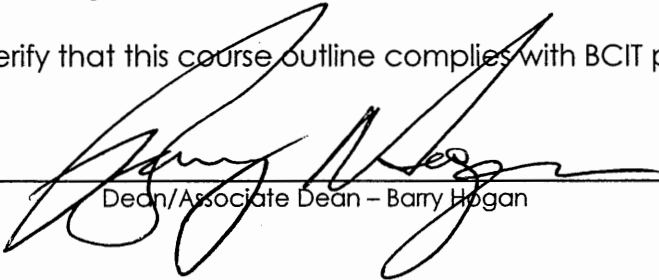


Program Head/Chief Instructor - Terry Gordon



Date

I verify that this course outline complies with BCIT policy.



Dean/Associate Dean - Barry Hogan



Date

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

### v Instructor(s)

Tracey Renzullo

Office: SE6 - 310 Phone: 604-451-7033

Office Hrs.: As posted E-mail: tracey\_renzullo@bcit.ca

### v Learning Resources

#### Required:

- ABC's of Relationship Selling through Service, Charles M. Futrell and Mark Valvasori, Third Canadian Edition, ISBN: 0-07-095187-X

#### 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

**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. **Missing more than 10% of classes without prior arrangement and consent of your instructor may result in a grade of 0% being assigned for your final exam, equating to a failing grade for this course.**

**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 your Sales Presentation Assignment will be provided in-class.

The Group Presentations will take place on May 2<sup>nd</sup>, 2007. Your group will be presenting the Financial Plan you developed for FMGT 4525 taught by Larry Stubbs. This presentation is worth 15% of your final grade. You will be given an opportunity to practice this in lab the week prior to your presentation taking place.

### Schedule

Dates	Outcome/Material Covered	Reading/Important Dates
<p><b>1</b> March 19 - 23</p>	<p><b>LEC:</b> Course Overview, Introduction to Selling as a Profession, Ethical Issues <b>LAB:</b> Introductions, Self-Assessment of Social Styles</p>	<p>Chapters 1, 2</p>
<p><b>2</b> March 26 - 30</p>	<p><b>LEC:</b> The Relationship Selling Process – The Approach and Needs Analysis <b>LAB:</b> Role Play – The Approach and Needs Analysis</p>	<p>Chapter 8</p>
<p><b>3</b> April 2 - 6</p>	<p><b>LEC:</b> The Presentation, FABs – Features, Advantages and Benefits, Trial Closes <b>LAB:</b> Role play – The Presentation, FABs, Trial Closes</p>	<p>Chapter 9 Labs will be videotaped.</p>
<p><b>4</b> April 9 - 13</p>	<p><b>LEC:</b> The Relationship Selling Process – Handling Objections and Closing <b>LAB:</b> Handling Objections and Closing</p>	<p>Chapters 10, 11</p>
<p><b>5</b> April 16 - 20</p>	<p><b>Midterm Exam – All material covered in lectures and labs</b></p>	<p>Midterm</p>
<p><b>6</b> April 23 - 27</p>	<p><b>LEC:</b> Preparation for Relationship Selling <b>LAB:</b> Rehearse Financial Planning Presentations</p>	<p>Chapters 3,4,5</p>
<p><b>7</b> April 30 – May 4</p>	<p><b>LEC:</b> The Relationship Selling Process – Prospecting and The Preapproach, RBC Mortgage Example</p>	<p>Chapters 6,7  May 2<sup>nd</sup> – Group Financial Planning Presentations</p>
<p><b>8</b> May 7 – May 11</p>	<p><b>LEC:</b> The Relationship Selling Process – Follow-up, Direct Marketing of Financial Services Products  <b>LAB:</b> Sales Presentations</p>	<p>Chapter 12  Sales Presentations Due in Labs</p>
<p><b>9</b> May 14 - 18</p>	<p><b>LEC:</b> Keys to a Successful Selling Career, Review  <b>LAB:</b> Sales Presentations</p>	<p>Chapters 13, 14  Sales Presentations Due in Labs</p>
<p><b>10</b> May 22 - 25</p>	<p><b>Final Exam – all material covered in lectures and labs</b></p>	<p>Final Exam Week</p>

NOTE: The schedule above is tentative and subject to change in the best interest of learners. Any changes will be announced in lecture and/or lab.