

# FINANCIAL SERVICES

## - Customer Driven Marketing of Financial Services

This two day course is tailored specifically to financial services and covers the key principles and latest thinking around customer driven marketing. This interactive course includes group workshops and case studies to enable delegates to apply the learning's in realistic scenarios and share ideas and experiences.

An understanding of the techniques and strategies to successfully acquire and retaining quality customers

### Who Will Benefit?

This course is particularly useful for:

- Marketing communications managers
- Senior product managers
- Customer Services managers
- Product development personnel
- Senior Marketing managers
- Strategy personnel
- Heads of marketing
- Distribution personnel
- Portfolio managers
- Heads of business units

This training course may contribute to your CPD (Continuing Professional Development) requirements.

### What makes this program unique?

Uniquely the course is delivered jointly by John Clark one of the leading consultants in this area and Dr Bruce Perrott Professor of Marketing at UTS and expert in marketing strategy and product development. It combines theoretical models with the hands on experience and realities of managing and developing financial services products in today's environment.

### About the presenter

**Dr Bruce Perrott** *BCom(Econ), MBA, PhD*

Dr Perrott is interested in how business and marketing strategies are formulated, formalised and managed through to the implementation phase. This interest is pursued through a broad range of activities including; the management of strategic projects; advice and consultation to senior management on strategic direction, methodology and process; setting strategies for profitable growth; education and management development on all aspects of strategic management and marketing.

### John Clark

John has over 20 years experience in financial services and as a marketing and product strategy consultant he has advised many of the leading financial service organisations including Barclays, LloydsTSB and the Royal Bank of Scotland. He has also headed up marketing functions within NatWest, Goldfish and Lloyds TSB and his extensive retail banking experience covers the breath of transaction accounts, loans, savings, credit cards and insurances.

John is also a course director with Euromoney training and delivers specialised product and marketing training courses across Europe, Africa, the Middle East and Asia.

John likes to take the theories behind product management and development and apply an element of pragmatism based on firsthand experience. He also likes to look outside of financial services when using practical case study examples. This outward looking approach helps to generate thought provoking ideas and discussion from the delegates to help transform their business and give them the cutting edge in the work place.

***Special guest speakers will also be featured in the program.***

### Further Information

Email:  
[executive.development@uts.edu.au](mailto:executive.development@uts.edu.au)  
Tel: + 61 (02) 9514 3504

Course Details	
<b>2012 Dates</b>	
<b>Duration</b>	2 day (9am-5pm)
<b>Price</b>	\$2,145 (incl GST) \$1950+\$195.00 GST)
<b>Discounts</b>	10% - UTS staff & students 15% - 3+ enrolments
<b>Presenter</b>	Dr. Bruce Perrott John Clark
<b>Location</b>	City/Haymarket Campus
<b>Max. Enrolments</b>	30
<b>Entry Requirements</b>	None
<b>Further Information</b>	Tel: 02 9514 3504 Email: <a href="mailto:executive.development@uts.edu.au">executive.development@uts.edu.au</a>

## Program

### Day 1

#### Analysing the wider Environment impacts

- The marketing environment
- The economic environment
- The social environment
- The market environment
- The Internal environment
- Evaluating developments in the marketing environment

#### Segmentation, targeting and positioning

- Successful segmentation
- Approaches to segmenting consumer markets
- Product oriented segmentation
- Targeting strategies
- Positioning products and organisations
- Perceptual mapping
- Repositioning

#### The new marketing paradigm

##### Promotion

- Principles of communication
- Planning a promotional campaign
- Forms of promotion

#### The new marketing paradigm

- Social networking
- Online search engine marketing e.g. google
- Online campaigns cash backs, email campaigns
- Affiliate networks
- Other advances in marketing
- Future trends

#### Case Study – Nationwide Building Society UK

- Customer Persistency – acquiring the right customers
- Retaining the right customers
- Customer retention strategies
- The customer relationship chain
- Lifetime customer value
- Loyalty schemes
- Credit card Loyalty schemes
- Customer data management

#### Service Delivery and Quality

- The Service profit chain
- Defining Service Quality
- Models of service quality
- Service failure and recovery

#### Customer Satisfaction and treating customers fairly (TCF)

- What is customer value and customer satisfaction?
- Managing customers expectations

### UTS Financial Services Marketing & Sales - Masterclasses



## Day 2

### Customer Relationship Management Strategies