

UTS:SHORT COURSES

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FINANCIAL SERVICES

- Marketing Strategy

This two day course is tailored specifically to financial services and covers the key principles and latest thinking around the latest trends of marketing financial services strategy, including distribution and internationalisation strategies relationship management, market research, acquisition strategies and loyalty schemes. 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.

Delegates will understand how to manage a financial services product portfolio for optimum growth and utilise key theoretical models to develop the winning product strategy. This course is thought provoking and delegates will be encouraged to think outside of financial services when evaluating competitive threats and new product design.

Who Will Benefit?

This course is particularly useful for:

- 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.

Further Information

Executive Development Unit

Tel: +61 (02) 9514 3504

Email: executive.development@uts.edu.au

Program

Day 1:

Morning - Global FS Marketing Today

- By John Clark

- The global FS scene
- Key marketing trends
- Emerging issues
- Some key marketing cases/examples/videos
- Assessing your marketing position/effectiveness

Afternoon- The Power of strategy

- By Bruce Perrott

- What is strategy
- The importance of strategy in FS
- Key business challenges
- Strategy as a series of choices- an assessment workshop
- Levels of strategy
- Balancing environment-strategy-capability
- Strategic management as process
- The business plan- structure and purpose

Day 2:

Morning: Marketing strategy for growth

- By Bruce Perrott

- What is strategic marketing?
- Strategic marketing for FS
- The complete marketing strategy
- Marketing as process
- Customer oriented culture
- BCG portfolio planning
- Market and FS product coordinated strategies

Afternoon- FS Marketing Action planning

- By John Clark

Practical and hands on ½ day: case studies/workshops/assessments tasks (eg SWOT of their marketing) /forward action planning etc.

Course Details

2012 Dates
Duration 2 days (9am-5pm)
Price \$2,530.00 (incl GST) (\$2300.00 + \$230.00 GST)
Discounts 10% - UTS staff & students 15% - 3+ enrolments
Presenter John Clark Dr. Bruce Perrott
Location City/Haymarket Campus
Max. Enrolments 30
Entry Requirements None
Further Information Tel: 02 9514 3504 Email: executive.development@uts.edu.au

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About the presenter

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

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.

UTS Financial Services Marketing & Sales - Masterclasses

