

Department of Management
Amrita Vishwa Vidyapeetham
Amritapuri

Course Title: Financial Services Marketing

Course Code: FI637E

Credits: 3

Total Sessions:24

Course Instructor: Dileep G Menon

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Course Link:

Office: F-14

Office hours: Monday and Thursday, 2pm to 4pm.

Course contributes mostly to: **Employability/** Entrepreneurship/ **Skill Development/ Value-add**

Course Description

Financial Services play key role in success any economy. Innovations in financial services products have made this one of the major contributors to the success of economy. This course will address the full range of financial services including investment and commercial banking, risk management, mutual funds, securities trading, lease and hire purchase, Factoring and Forfaiting, credit cards, banc assurance and financial services by non-banking financial services. The practical issues on customer service and marketing of all these products will also be discussed in the course. This course will provide satisfactory understanding about Indian financial services sector.

Course Objectives (COs)

The objective of the course is to enable the students to:

1. understand the various financial products available in India.
2. Sell mutual funds in India through NISM VA certification.
3. understand the current marketing trends in financial services.
4. identify, understand and meet the needs and wants of customers so as to ensure proper financial products are given to them.
5. know the underlying principles of relationship marketing and customer service.
6. Know the marketing mix, branding, advertising etc for financial products.

Alignment of course objectives (CO) with learning goals (LG) of Assurance of Learning

The course discusses various financial products like bank accounts, credit cards, retail and business loans, insurance, mutual funds, demat and trading accounts among many others and gives detailed awareness about all these products. Various presentations done during the course helps the students to present these products to target audience.

NISM series V-A certification allows the students to sell mutual funds under a mutual fund distributor. This also gives them in-depth knowledge on mutual funds.

Sessions about current marketing trends in financial services equip the students with required skills to meet the challenges in marketing of financial services. Students are given training on how to do prospecting and cold-calling in a customer-centric approach.

In the world of financial services where product differentiation is very thin, all that matters is customer relationship and customer service. Students are given practical awareness and skills for relationship marketing.

LG \ CO	Critical and integrative Thinking	Effective written and oral communication	Societal and Environmental Awareness	Ethical Reasoning	Leadership
CO1	3	2	1	1	2
CO2	3	2	0	0	2
CO3	3	1	1	0	2
CO4	2	2	2	2	2
CO5	0	2	3	2	2
CO6	3	2	0	0	1

Key: 3 – Highly relevant; 2 – Moderately relevant; 1 – Low relevance; 0- No relevance

Unit-wise scope for outcomes and Bloom's taxonomy

Bloom's Levels of Learning \ CO	CO 1	CO 2	CO 3	CO 4	CO 5	CO 6
Creating				X		
Evaluating	X	X	X	X	X	X
Analyzing	X	X	X	X	X	X
Applying	X	X	X	X		X
Understanding	X		X	X	X	X
Remembering	X				X	

Structure of the course

This is an elective course offered in Term 5 for a Six Trimester MBA program. This is offered to students specializing in finance to give them marketing ideas to sell financial products.

Pedagogy

Students are expected to attend and actively participate in all classes, come prepared to the class with the assigned readings/assignments, submit the assigned work on time. NISM certification is a mandatory requirement for passing the course. Academic dishonesty will not be tolerated and can

lead to 'nil' marks in the concerned component or an 'F' grade in the course as per the norms of the institution. Attendance expected from students is 90%.

Assessment (Grading Policy: Relative)

S. no	Assessment exercise	Description	Weight
Group assessment 10%			
1	Group Presentation	<i>Students will be divided into groups and have to present a given topic</i>	10%
Individual Assessment 90%			
1	Term Paper and Quizzes	<i>Students will have to write a term paper on the subject chosen in more than 1500 words with a similarity level of less than 25%. Surprise quizzes will be a part of evaluation</i>	25%
2	NISM Certification	<i>A pass in NISM series V-A is a mandatory requirement to pass the course</i>	15%
3	Sales Pitch Video	<i>Students should create a selfie-video on selling any of the financial products discussed in class to a prospective customer.</i>	10%
4	End Term Examination		30%
5	Class Participation	<i>Students are expected to actively participate in classroom discussions</i>	10%

Course Requirements

This course is for second year students in MBA program with finance specialization.

Course Text

Sharma, R., & Mehta, K. (2017). *Financial Services Marketing*. Cengage.

Contribution to Placements

This course helps students with required skill sets to work in any financial services company like bank, insurance companies, asset management companies etc. NISM certification gives them an added advantage for placement.