

## Subject overview

The objective of this subject is the implementation of a bespoke client experience business plan (Strategic Marketing Plan) that will help you maintain and attract your ideal clients. At the end of the ten (10) weeks you will be ready to apply the principles of a sophisticated client engagement strategy for your business. The strategy also forms one of the assessable tasks for this subject. The feedback you receive on your marketing strategy will set you up in establishing and embedding your individual marketing and client experience philosophy in your business.

## Subject learning outcomes

On successful completion of this subject, you should be able to:

1. Integrate the marketing and sales functions in a financial planning context.
2. Design a marketing plan and sales plan for a financial planning practice.
3. Assess different buyer behaviour models and how these relate to the various market segmentation approaches.
4. Assess the different promotional and communication activities used by financial planners to acquire customers and manage customer relationships.
5. Evaluate product or service distribution channels for the purposes of marketing and sales promotion and communication.
6. Integrate legal compliance and ethical conduct in financial planning services marketing and sales.
7. Assess the effectiveness of sales and marketing activities in a financial planning practice.

## Subject snapshot

The table below provides a quick overview of this subject. It lists each topic and identifies when assessment items occur and recommends the study effort for each topic or assessment task. This snapshot is a useful tool for developing a study plan.

Week(s)	Topic name	Recommended student effort
1-2	Topic 1: Segmentation, targeting and positioning Topic 2: Consumer profiling and buyer behaviour	15 hours
3-4	Topic 3: Predicting and managing behaviour Topic 4: Marketing	20 hours
5	Topic 5: Developing a strategic marketing plan	10 hours
6	Topic 6: Defining the advice offer	10 hours
7-8	Topic 7: Channel management Topic 8: Promotion	20 hours
9-10	Topic 9: Pricing your advice offer Topic 10: Branded advice environment	20 hours
11	Exam and Assignment preparation	15 hours
12	<b>Exam (Weighting: 50%)</b> <b>Assignment (Weightin: 50%)</b>	10 hours

<b>Total Hours</b>	<b>120</b>
--------------------	------------

**Assessment schedule**

---

<b>Assessment</b>	<b>Description</b>	<b>Week</b>	<b>Topics</b>	<b>Weighting</b>	<b>Subject learning outcomes assessed</b>
Exam	Multiple choice exam	Week 12	1-10	50%	LO1-7
Assignment	Strategic Marketing Plan	Week 12	1-10	50%	LO1-7