

FINANCIAL PRODUCTS MARKETING & CUSTOMER EXPERIENCE



- 11 Certificate Courses
- 50+ Hours of Digital Content
- Access to Content on Digital Platform

Course Fee
25,000/- +GST

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ABOUT THE COURSE

The "Financial Products Marketing & Customer Experience" course is a 50+ hours program designed to equip participants with a deep understanding of marketing fundamentals, customer experience in the digital age (Bank 4.0), data-driven marketing trends, and the essential skills needed to effectively market and sell financial products. From building marketing insights to managing sales pipelines and mastering data visualization, this course covers a wide array of critical topics. Students will also develop negotiation and communication skills while gaining insights into business valuation, making it an indispensable resource for those looking to excel in the financial services industry. This Program also includes quintessential components of business valuations required in the age of digital marketing of ideas and products.

KNOWLEDGE PARTNERS



COURSE LIST



- 1. Fundamentals of Marketing | 10 Hrs**
 - 2. Customer Experience (CX) in Bank 4.0 | 4 Hrs**
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- 3. Business Valuation | 6 Hrs**
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- 4. Fundamental of Customer Experience | 2.5 Hrs**
 - 5. Insights and Trend in data driven Marketing | 4 Hrs**
 - 6. Digital Fundamentals in Connected World | 2.5 Hrs**
 - 7. Build Marketing Insights | 4 Hrs**
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- 8. Wealth Management | 20 Hours**
- 9. Investment Analysis and Portfolio Management | 3.5 Hour**
- 10. Financial Statements | 04 Hour**
- 11. Financial Derivatives | 20 Hours**

1. Fundamentals of Marketing

 **10 Hours**

Course offered by



Course Access: 1 Year



The realm of marketing also deals with identifying and reaching the target customers successfully, creating relationships by understanding the customer life cycle and eventually retaining the customers and making them loyal. It is also essential to understand the customer buying process and the life cycle to be able to market effectively and communicate the value of the product or service effectively. At the core, it is the customer-centric approach adopted by organizations and marketing professionals that helps them re-align the focus from product to customers. Being customer-focused, it helps organizations reap the benefits of customer loyalty and advocacy. The course endeavors to provide comprehensive and engaging learning of marketing fundamentals, concepts, and skills needed to be successful in marketing.

Course Outline

- **Marketing concepts and evolution**
- **Service Marketing**
- **Understanding and Leveraging Customer Life Cycle, Customer Centricity and Customer Value Proposition**
- **Understanding the Selling process – Communication skills**
- **Presentation Skills & Negotiation Skills**

2. Customer Experience (CX) in Bank 4.0

 **4 Hours**

Course offered by



Course Access: **1 Year**



India's consumer markets are well-positioned to gain from favorable macroeconomic and demographic factors. India has one of the youngest populations among large countries. It has become one of the major flag-bearers of development across the globe. The generation of these new age customers is entering the workforce and influencing the consumer market. Their influence also defines how they are perceived, so that organizations can try to understand how to engage with them. The influence they wield has created economic effects and impacted the Banking & Financial Sectors also. Due to the rapid penetration of the Internet and access to information, they are ready to drive the banking industry onto a whole new track soon.

Course Outline

- **Evolution of Banking and digital disruption**
- **Introduction to Customer Experience (CX) and Customer Life Cycle**
- **Innovation & impact of exponential technology in Customer Experience (CX)**
- **Key drivers of implementing Bank 4.0**

3. Business Valuation

 **6 Hours**

Course offered by



Course Access: 1 Year

This curriculum teaches the fundamentals of valuing public and private companies through a case study approach. It covers the different methodologies and focuses on the Discounted Cash Flow (DCF) method as participants build a DCF analysis for an actual acquisition, using each component of the DCF model: projected free cash flows, Weighted Average Cost of Capital (WACC) and terminal value. The program concludes with an introduction to sensitivity and scenario analysis, which is used to improve the base case valuation.

Course Outline

- **Introduction of Business Valuation**
- **The Foundations of free cash flow**
- **The weighted average cost of capital**
- **Terminal Value**
- **The DCF approach to business valuation**
- **The limitations of the DCF approach**



4. Fundamental of Customer Experience

 **2.5 Hours**

Course offered by



DEAKINCo.

Course Access: 1 Year

Customer experience is a crucial part of marketing and business success. Being able to see the business from the customer's perspective, understand their needs or requirements and how they interact with an organization helps shape the customer experience being delivered.

In this foundational customer experience course, you will learn how to provide customers with a quality experience by focusing on their needs and requirements. You will be taught industry tools and techniques to help analyze, monitor and gain insights into the customer experience. We'll look at common customer experience tools, techniques for customer engagement and how a strong customer experience can support valued repeat business from customers as well as attract new customers.

Course Outline

- **Module 1: Customer experience tools**
- **Module 2: Customer identification**
- **Module 3: Customer engagement**
- **Module 4: Customer perspective**
- **Module 5: Course completion**



5. Insights and Trend in data driven Marketing

 **4 Hours**

Course offered by



DEAKINCo.

Course Access: 1 Year

This foundational data-driven marketing course explores how to find, analyze, and put relevant marketing data into action. This includes knowing your customer, understanding how best to communicate with them and understanding the marketing process from initial research through to putting a plan into action. You will be taught how to collect, synthesize, and report on data from routine sources to draw out insights, focusing on customer experience, brand, product, or campaign performance.

Course Outline

- **Module 1: Marketing data**
- **Module 2: Marketing reports**
- **Module 3: Marketing processes**
- **Module 4: Marketing campaigns**



6. Digital Fundamentals in Connected world

 **2.5 Hours**

Course offered by



DEAKINCo.

Course Access: 1 Year

This foundational digital literacy course teaches you how to use standard software and hardware to create, edit, organize, store and retrieve information. You will learn how to identify a range of digital tools to communicate, create and share information online, and gain an awareness of how data is tracked, retained and used. You will learn how to use technology to improve the productivity, efficiency and effectiveness of your work and your communication with friends, colleagues and customers.

Course Outline

- **Module 1: Digital technologies**
- **Module 2: Digital communication**
- **Module 3: Digital information**
- **Module 4: Digital technologies**
- **Module 5: Course completion**



7. Build Marketing Insights

 **4 Hours**

Course offered by



DEAKINCo.

Course Access: 1 Year

Building market insights explores marketing data analysis, trends, and strategies. In your current role you will have experience of some, or all of these functions and you will already be familiar with the concepts. Data-driven marketing is essential in all workplaces and includes undertaking data analysis, understanding marketing trends, and evaluating marketing strategies.

Course Outline

- **Module 1 Marketing data analysis**
- **Module 2 Marketing trends**
- **Module 3 Marketing strategies**



8. Wealth Management

 20 Hours



This course explains investment strategies and performance evaluation. It will help you to manage your wealth and plan your portfolio. It will also help in tax and estate planning and give various financial planning strategies. This will help you allocate wealth through a systematic understanding of risk and reward and planning specific goals

Course Outline

- Introduction to Financial Planning
- Asset Classes
- Financial Planning Tools
- Asset Allocation
- Modern Portfolio Theory
- Measuring Risk and Return
- Elements of the Financial Plan
- Tax Planning
- Customer Relationship Management

9. Investment Analysis and Portfolio Management

 **3.5 Hours**



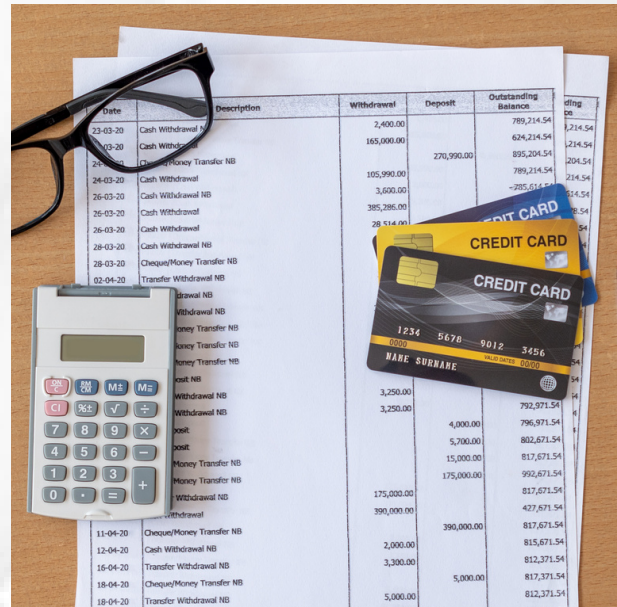
Investments are common across all investors from the individuals to the fund managers and institutions. However, analysis and investments based on such analysis is carried out by trained managers and informed investors. This course helps you understand all types of investments and analyze them with a need to invest effectively and efficiently. It covers all investments including equity, debt, and derivatives. Investing in markets that are not in the same efficiency level, analyzing individual investments and handling portfolios are some of the skills that this course covers.

Course Outline

- **Objectives of Investment Decisions**
- **Financial markets**
- **Capital market Efficiency**
- **Fixed Income Securities**
- **Capital market Efficiency**
- **Financial Analysis and Evaluation**
- **Modern Portfolio Theory**
- **Valuation of Derivatives**
- **Investment Management**

10. Financial Statements

 04 Hours



This course helps in understanding the fundamentals of the company. Understanding them from the financial statements along with the reports published in the annual reports is always a challenge. There are a plethora of things related to the figures in financial statements and makes it difficult for the investor to analyze. This course helps in understanding as to what the financial statement comprises of and what should an investor choose for his analysis. By completing this course, you can evaluate the overall health of any company, business value along with understanding companies' future risks and potential.

Course Outline

- **Profit & Loss (P&L) Statement: The components of a P&L Statement**
- **Cash Flow Statement: The concept of a Cash Flow Statement and its break-down into Financing, Investing and Operational Cash flows**
- **Statement - measures of profitability, and items of expense.**
- **Balance Sheet: A detailed discussion on various components of a Balance Sheet, such as Current Assets, Owner's Equity, Contingent Assets & Liabilities etc**

11. Financial Derivatives

 **20 Hours**



This course aims at providing an in-depth knowledge about derivatives. This course covers all types of derivatives including financial, interest rate, currency and commodity derivatives and all types of derivative products. This covers advanced derivatives and regulations related to derivatives. Various advanced derivatives and strategies for trading and pricing derivatives are also covered. This gives a knowledge of all derivatives.

Course Outline

- **Introduction**
- **Application of Derivatives**
- **Forwards**
- **Futures**
- **FRAS**
- **SWAPS**
- **Options**
- **Structured Products**

CONTACT DETAILS

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Refund Policy

- Registration Fees paid by the candidate shall not be refunded under any circumstances after the login id of the application has been shared to candidates
- In case the registered candidate wishes to cancel the registration for the program the candidate has to inform NAL Academy via a written request/Email request a minimum of 2 working days prior to the commencement of the program. Once this request is approved, the candidate will be refunded 90% of the total course fees paid for the respective program.