

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**
 - 3. Fundamentals of API services | 5 Hrs**
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- 4. Business Valuation | 6 Hrs**
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- 5. Customer Acquisition—Branch Operations & Client Services | 2.4 hrs**
 - 6. IA Transformation | 1.5 Hours**
 - 7. Remittance & Swift | 9.2 Hours**
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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**
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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. Fundamentals of API services

 **5 Hours**

Course offered by



Course Access: 1 Year

In the age of technological innovations across the industries, APIs are revolutionizing the way financial data is accessed and personalized services are delivered to the customers. This comprehensive online course on Fundamentals of Banking API Services, aims to equip the learners with adequate knowledge regarding API services provided by banks. We will start with general understanding of APIs and how APIs can be used in banking. We will discuss how these services are beneficial for the customers and to the banks. How third parties other than banks can also make use of APIs and give better services to the customers. We will discuss about few real-world examples of API Services by banks and the technology behind the API services, what are the protocols, standards, design principles in API services, security, and authentication in API services. We will finally discuss about the future trends; the way APIs will be used. Whether you're a beginner or an experienced professional, this course offers valuable knowledge and skills that can enhance your career prospects in banking and finance.

Course Outline

Module 1: Introduction to Banking API Services

Module 2: Understanding APIs

Module 3: Usage of APIs in Banking

Module 4: Real world examples of API banking

Module 5: Technology behind Banking API Services

Module 6: Future Possibilities with Banking API

Module 7: Governance and Compliance requirements in Banking API Services

Module 8: Conclusion



4. 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**

5. Customer Acquisition— Branch Operations & Client Services



 **2.4 Hours**

Course offered by
Deloitte.

Course Access: 1 Year

Build a strong understanding of customer acquisition, branch operations, and client servicing processes. Explore investor decision-making, customer acquisition strategies, transaction flows, and the key operational and servicing processes that enable effective branch management and seamless client experiences

Course Outline

- **Investor decision**
- **Customer acquisition strategy**
- **Branch operations**
- **Flow of transactions**
- **Key element of the branch and key servicing process**

6. IA Transformation

 **1.5 Hours**



Course offered by
Deloitte.

Course Access: 1 Year

As per the three lines of defense, audit function is the third line of defense, wherein it is independent to the business, support, risk, and compliance functions. Several regulators mandate the need to have an audit function as an independent entity within an organization.

Course Outline

- Importance of Audit
- Regulatory Norms
- IIA Standards
- Lifecycle of Audit
- Objectives & Scope of Internal Audit
- Transformation Project
- Audit Governance Framework
- Analytics and Internal Audit
- Future of Internal Audit
- Execution process

7. Remittance & Swift

 **9.2 Hours**



Course offered by
Deloitte.

Course Access: 1 Year

This course provides an overview of customer acquisition and branch operations, covering investor decision-making, customer acquisition strategies, and the end-to-end flow of transactions. It explores key branch functions and servicing processes, helping participants understand how branches manage customer interactions and deliver efficient client services

Course Outline

- Overview of remittances
- Outward Remittances
- Regulatory Reporting
- Inward remittances
- Beneficiary Identifier Code (BIC)
- How does SWIFT work?
- SWIFT message types
- Regulatory Guidelines
- Audit Approach
- Blockchain

8. Wealth Management

 20 Hours

Course offered by

NAL
Academy



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 & Portfolio Management

 **3.5 Hours**

Course offered by

NAL
Academy



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

Course offered by

NAL
Academy



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**

Course offered by

NAL
Academy



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**



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State Bank of India (SBI) a Fortune 500 company, is an Indian Multinational, Public Sector Banking and Financial services statutory body headquartered in Mumbai. The rich heritage and legacy of over 200 years, accredits SBI as the most trusted Bank by Indians through generations. SBI, the largest Indian Bank with 1/4th market share, serves over 48 crore customers through its vast network of over 22,405 branches, 65,627 ATMs/ADWMs, 76,089 BC outlets, with an undeterred focus on innovation, and customer centricity, which stems from the core values of the Bank - Service, Transparency, Ethics, Politeness and Sustainability. The Bank has successfully diversified businesses through its various subsidiaries i.e SBI General Insurance, SBI Life Insurance, SBI Mutual Fund, SBI Card, etc. It has spread its presence globally and operates across time zones through 235 offices in 29 foreign countries. Growing with times, SBI continues to redefine banking in India, as it aims to offer responsible and sustainable Banking solutions.



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