

AIB Financial and Business Planning for Bank Marketers

(Registration deadline is one week prior to start date)

This AIB course is designed to inform and train bank personnel to perform more effectively and efficiently in the financial and business aspects of the marketing function. Its major objectives are to help marketers understand the sales goals of their business partners, and to access and communicate more effectively how marketing's efforts can help the various bank departments meet and exceed those goals.

Financial and Business Planning for Bank Marketers is an eight-module, 9-week class taught in the same format as the other AIB Online classes. Participants have access to a new lesson each Friday and will have until the following Sunday (10 days) to complete it. They may complete the lesson anytime during the week. Typically, participants will log on to the Internet two to three times during the week, and may do so whenever and wherever it is most convenient to them.

Price	\$395 Nonmembers / \$315 Members	
Course Length	9 Weeks	
Course Credits	AIB: 1.0; ICB: 2CFMP	
Prerequisites	None	
Required Software	Microsoft Excel, Adobe Acrobat Reader, Microsoft Internet Explorer Browser 7.0 or Mozilla Firefox 2.0 or higher	
Textbook	All reading materials are provided online	
Start date/Catalog #	March 1, 2010	3005439
	June 21, 2010	3005498

Audience

All bank marketers or employees with marketing responsibilities who are involved with or would like to understand the financial and business planning aspects of the function.

Topics Covered

- Purpose of the Budgeting Process---discusses why the budgeting process is an integral part of bank management; presents an overview of income statement and balance sheet dynamics; and demonstrates how the marketing budget relates to the bank's overall budget.
- The Bigger Picture---provides an overview of the fundamentals of finance and how banks generate revenue; includes insights into asset-liability management functions; and demonstrates how the marketing function affects the financial institution's overall bottom line.
- Building a Budgeting Process that Fits Your Bank---teaches how to develop a budget that best fits your bank, and describes methods used for choosing priorities that are strategically and financially viable.
- Monitoring the Budget Process---teaches how to design a process to analyze the monthly performance of marketing initiatives based on your bank's primary strategy.

- Showing a Return on Marketing Investment---discusses how to achieve tangible results from invested marketing dollars and how to use measurement and analytical tools to help monitor those results.
- Profitability---explores the challenges of profitability measurement and the approaches used to enhance the value-exchange proposition between the bank and client.
- Pricing Strategies---examines how different models for pricing products and services can create a variety of outcomes; presents strategies for deposit, loan, and fee service pricing; and discusses the fundamentals of supply-and-demand curves and elasticity of demand with a future view for bankers.
- Identifying and Leveraging Target Markets---discusses why defining specific target markets for products and services is imperative for banks to succeed; explores strategies for collecting and sharing client data; and examines ways in which customer relationship management (CRM) solutions can be used to add value to a bank's sales and service quality.

