

Become a...

Chartered Financial Marketer

**Certified by the American Academy of Financial Management (AAFM).
Recognised in over 145 countries by 560 training providers, universities,
colleges and business schools.**

23 – 27 November 2008, AAFM Training Center

Course Overview

The course has been designed to teach the practical marketing techniques and skills required by marketing and customer relationship professionals. It covers nine major subject areas and utilises a variety of training techniques. The key areas of the agenda include:

- The competitive environment
- The role of marketing
- Customer behaviour
- Developing new products and services
- Pricing strategies
- Promotion and communication
- Distribution and multi-channel considerations
- CRM and marketing strategy and planning.

The emphasis is practical and pragmatic rather than theoretical, with real case studies from some of the world's top banks.

Who should attend?

This highly practical qualification has been specifically designed for:

- Marketing Managers
- Marketing Practitioners
- Advertising and PR Agency Executives
- Customer Relationship Managers
- Product Line Managers
- Retail Banking Managers
- Sales and Promotions Managers.

Course Objective

The goal of this course is to provide marketing and customer relationship professionals with diagnostic skills that can be immediately used upon return to your respective regional and international banks, marketing departments or agencies.

You will learn to use demonstrated marketing strategies which will enable you to help your organisation (or in the case of agencies – clients) compete in an increasingly competitive market.

This course is also designed to enhance the documentation of marketing teams which will reduce planning time and enhance business cases to support new products and campaigns.



**“Excellent – a very good teacher.
Provided excellent business examples
tackling new business philosophies
in accounting controls,
e-commerce and e-business.”**

Amer Salim Al Jabri,
Planning Analyst
ADGAS, U.A.E.

Dear Finance Professional,

The American Academy of Financial Management (AAFM) is committed to developing marketing skills at all levels of financial personnel and management.

The Chartered Financial Marketer (ChFM™) training program is designed to develop marketing and sales best practice and is delivered by proven business professionals, helping you develop the skills you need to enable your organization to develop strategic plans that fuel growth and profitability, while improving customer satisfaction and retention.

To join your financial and marketing peers on this program simply fax the registration form to +965 246 2050 or email to enrollQ8@aafmgcc.com. I look forward to welcoming you to the program in November 2008.

Yours Sincerely,

Geoffrey Bye

AAFM GCC Chapter President

P.S. You will receive up to 18 months premiership to the AAFM professional body when you attend this event and be entitled to use the registration ChFM™ on your business card and resume.

Meet Your Expert Program Directors



Geoffrey Bye

VP Marketing & AAFM Chapter President

Geoffrey has over 20 years award winning experience in brand and marketing management ranging from developing newly created roles through to building talented and entrepreneurial marketing teams across Europe, Asia and the Middle-East regions. He is VP Marketing for AAFM and GCC Chapter President.

Geoffrey's previous roles include Marketing Director with DHL for the Asia-Pacific and UK markets where he was responsible for DHL's successful brand positioning and customer relationship strategies. Geoffrey's other roles include Chief Marketing Officer with One-Asia.com, part of Li Ki Shing's TOM Media Group, AVP of E-Marketing for Manulife Financial and Managing Director of ITC, a Kuwait based company specializing in project marketing.

Geoffrey has had experience in managing multi-cultural teams, with marketing and advertising budgets in excess of US\$60m across more than 50 markets. He is currently involved in local Kuwait business activities as a board member and treasurer of the British Business Forum.

Geoffrey is a Chartered Marketer with the UK's Chartered Institute of Marketing, and lead trainer on AAFM's ChFM™ program which he has developed and delivered to in-house corporate clients and on public courses in the Gulf region.



Maher Mezher

Global Leadership Team

AAFM Beirut

Maher Mezher is an experienced financial practitioner and lead trainer AAFM's Chartered Financial Marketer™ program. He is currently Retail & Marketing

Manager for Lebanon & Gulf Bank and has a strong operational and implementation background in marketing, sales, CRM and customer service management.

Maher holds a Masters in Marketing and Communication from the European School of Management, ESCP-EAP along with an MBA from Newport University, USA. In addition he has a Bachelor of Science in Finance from Saint Joseph University, Beirut.

Maher has trained many professionals in the Middle East in the areas of sales skills development, marketing, CRM as well as handling effective complaints, stress & time management and excellence in call centre management.

Maher speaks, reads and writes fluent Arabic, English and French and has basic fluency in Italian and Russian. Maher is also an accomplished recorder and piano player and a world-class opera tenor.

By attending this course, the added benefits you will receive include:

- The ability to use the designation Chartered Financial Marketer (ChFM™) on your business card and resume
- Up to 18 months membership to the AAFM professional body
- Access to the AAFM risk management network and body of information online
- Being taught by a leading finance expert from the American Academy of Financial Management
- Membership to the only professional body recognised by the AACSB, the world's leading collection of business schools
- Preferred access to education centres in USA, UK, Europe, Asia, Middle-East and Latin America
- Qualification for entry into the AAFM Master Financial Professional programme
- Access to the AAFM international journal published online
- Gold Embossed Certificate with your name and designation as a MAAF (Member of the American Academy of Financial Management)
- Full accreditation fees included in the course fees.

AAFM™ Chartered Financial Marketer

Program Outline

Course Timings:

Registration will be at 08:00 on Day One with the program commencing promptly at 08:30 each day. There will be two short breaks each day and the sessions will conclude at 14.30 with lunch.

Day One

The Changing Marketing Environment For Banks And Institutions

- Impact of globalisation and changing banking industry paradigms
- Changing customers – changing customer wants, needs and behaviours
- Decreasing customer loyalty and the impact on bank marketing
- The blurring lines of banks and other financial services

Case Study: Impact of Charles Schwab's e-trading business on Merrill Lynch

The Role Of Marketing

- The role of marketing strategy in corporate strategy
- The value concept in banking – customer value for banks and creating value for customers
- Value creation as a sustainable competitive advantage for banks

Breakout Session: Defining your USP

Day Two

Consumer Behaviour And Its Impact On Marketing In The Financial Services Arena

- Understanding the behavioural drivers for retail customers and private banking clients
- Understanding the behavioural drivers of institutions and business to business banking
- Marketing research and how it helps marketers make decisions
- Segmentation, targeting and positioning – how banks find, target and develop relationships with valuable segments in the banking market
- Segmenting and positioning in retail banking markets
- Segmenting and positioning in institutional banking markets

Breakout Session: Creating segmentation maps for your brand plan

Day Three

Developing New Banking Products And Services

- Understanding banking products and what they do for customers
- Product development and product portfolio management
- Services marketing and how services require different strategies
- The vital role of brand and brand management
- Brand as the key differentiator – establishing, positioning and sustaining brand equity and loyalty

Case Study: Credit cards' market in Hong Kong and

Singapore – victims of promotion-based marketing

Pricing Strategies

- Managing the price - volume - profit equation
- Customer understandings of price and how they can be managed
- Competing effectively on price and how to avoid price wars

Case Studies: Commonwealth Bank, Barclays Bank and First Chicago Bank

Day Four

Promotion And Communication

- The role of integrated marketing communications
- The characteristics of effective communications
- Elements of an effective communication mix
- Planning marketing communications campaigns

Multi-Channel Integrated Marketing

- Developing channel strategies
- Channels as a differentiator
- The importance of integrating channel strategy with other marketing strategy
- Creating a multi-channel 'journey' for customers
- The role of on-line channels for promotion, relationship and fulfilment

Breakout Session: Creating an integrated campaign with print, e-DM and a mini-site for promotion of a new product/service

Day Five

Relationship Marketing And Customer Relationship Management

- The importance of relationships for customers
- The importance of relationships for banks
- Components of an effective relationship
- Creating and sustaining relationship strategies

Marketing Strategy Development, Planning And Implementation

- Components of an effective marketing plan
- Processes that produce successful plans
- Using analysis to establish marketing objectives and strategies
- Implementing and monitoring the plan to maximise outcomes

Breakout Session: Presenting your marketing plan to the group

Review And Programme Summary

Why Finance Marketing?

In many financial markets, deregulation and competitive pressures have made it very difficult to differentiate by product and marketing has become an essential component in driving business activity. Home grown institutions in the Middle East have to start with building a world-class brand and professionally market core products and services to the right target audience in order to compete with world class players like HSBC, Citigroup, Standard Chartered, Merrill Lynch and others.

Registration Form

Three Easy Ways To Enrol

T +965 2 246 2030 / +965 9 7688 433
F +965 2 246 2050
E enrollQ8@aafmgcc.com

Course Dates

Chartered Financial Marketer
 23 - 27 Nov 2008

Timing

Morning or Evening Depending on Majority

Venue

AAFM Training Center
 Salhia Complex
 Kuwait City

Program Fee

Regular fee KD900.00

Early Bird Discount:

Register on or before 13 Nov and save KD50

Individual & Corporate Schemes

Enjoy the benefits of our reward, royalty schemes and pricing strategies.

Payment Methods

Please pay by Cheque, Cash or Bank Transfer. KD100 un-refundable registration fees must be paid prior to programme commencement.

All cheques should be crossed and made in favour of American Academy of Financial Management.

The fee includes instruction, course material and detailed case studies. On successful completion of the course, the AAFM award free membership for a period of up to 18 months.

Registration Details

Title: First Name:

Last Name:

Company Name:

Job Title:

Department:

Address:

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Country:

Tel:

Fax:

Mobile:

Email:

For multiple registrations, please copy this page.

Yes! I would like to receive information about future events and services via email.

Payment Options

- Cash
- Cheque – Payable to “American Academy of Financial Management”
- Bank Transfer – American Academy of Financial Management, Commercial Bank of Kuwait, Hawalli Branch, Account Number: 2001012338.

Cancellation

If you are unable to attend, a substitute delegate will be very welcome in your place. If this is not suitable, a KD 100 registration fees will be retained.

Customised Solutions And On-Site Training

AAFM provides tailor-made, superior and highly cost-effective in-house training with professional certification awarded. Our certifications can be articulated to a full university qualification or simply be a highly focused, tailored curriculum delivered by the most experienced industry experts. With global recognition and a faculty of specialists who are industry practitioners, we teach the ‘how’ and ‘why’, not just the ‘what’. Call us now on +965 246 2030 or email enrollQ8@aafmgcc.com

In the case of unforeseen circumstances, AAFM reserves the right to change venue and/or speakers.

