# Course Change Request

## New Course Proposal

**Date Submitted:** 12/08/17 7:39 am

**Viewing:** **FINC 636 : Marketing Financial Products and Services**

**Last edit:** 12/14/17 11:46 am  
Changes proposed by: ritzcracker

**Faculty Senate Number**

<table>
<thead>
<tr>
<th>Contact(s)</th>
<th>Name</th>
<th>E-mail</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rebecca Itz</td>
<td><a href="mailto:ritz@mays.tamu.edu">ritz@mays.tamu.edu</a></td>
<td>979-458-1635</td>
</tr>
</tbody>
</table>

**Course prefix**  FINC  
**Course number**  636

**Department**  Finance

**College/School**  Mays Business School

**Academic Level**  Graduate

**Academic Level (alternate)**  Undergraduate

**Effective term**  2018-2019

**Complete Course Title**  Marketing Financial Products and Services

**Abbreviated Course Title**  MARKETING FINC PROD & SVCS

**Catalog course description**  Marketing and sales processes for presenting major banking products and services to clients and prospects of commercial banks; strategies for successfully positioning a commercial bank in its trade area; the consultive sales process and effective presentation skills.

**Prerequisites and Restrictions**  Admission to Mays Commercial Banking Program.

**Concurrent Enrollment**  No

**Should catalog prerequisites / concurrent enrollment be enforced?**  No

**Crosslistings**  No  
**Crosslisted With**

**Semester**  3  
**Credit Hour(s)**  3  
**Contact Hour(s) (per week):**  3  
**Lecture:**  Total  3  
**Lab:**  0  
**Other:**  0

**Repeatable for credit?**  No

**Three-peat?**  No

**CIP/Fund Code**  5208030016

**Default Grade Mode**  Letter Grade(G)

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**In Workflow**

1. FINC Department Head
2. Curricular Services Review
3. BA Committee Preparer GR
4. BA Committee Chair GR
5. BA College Dean GR
6. GC Preparer
7. GC Chair
8. Faculty Senate Preparer
9. Faculty Senate
10. Provost II
11. President
12. Curricular Services
13. Banner

**Approval Path**

1. 12/12/17 3:16 pm  
   Richard Dye (tdye): Approved for FINC Department Head
2. 12/14/17 11:47 am  
   Sandra Williams (sandra-williams): Approved for Curricular Services Review
3. 12/15/17 9:49 am  
   Angela Catlin (ajcatlin): Approved for BA Committee Preparer GR
4. 12/15/17 10:49 am  
   Michael Shaub (mshaub): Approved for BA Committee Chair GR
5. 12/19/17 10:21 am  
   Michael Kinney (kinneym): Approved for BA College Dean GR
6. 01/02/18 4:36 pm  
   LaRhesa Johnson (lrjohnson): Approved for GC Preparer
7. 01/20/18 9:37 pm  
   LaRhesa Johnson (lrjohnson): Approved for GC Chair
Alternate Grade Modes: Satisfactory/Unsatisfactory
Method of instruction: Lecture
Will sections of this course be taught as non-traditional? (i.e., parts of term, distance education): No
Will this course be taught as a distance education course?: No
Is 100% of this course going to be taught in Texas?: Yes
Will classroom space be needed for this course?: Yes

This will be a required course or an elective course for the following programs:

<table>
<thead>
<tr>
<th>Program(s)</th>
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<tbody>
<tr>
<td>(MFM-FINM) Master of Financial Management in Financial Management</td>
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</tbody>
</table>

Course Syllabus

Syllabus: Upload syllabus
Upload syllabus: 636 Mktg Finc and Sys.docx
Letters of support or other documentation: No
Additional information

Reviewer Comments
Richard Dye (tdye) (09/26/17 11:01 am): Change prerequisites to "Admission to Mays Commercial Banking Program."
Richard Dye (tdye) (09/26/17 11:02 am): CIP code is incorrect, should be 5208030016.
Richard Dye (tdye) (09/26/17 11:03 am): Change from required MFM course to elective since not all students in the MFM program will take this course, only those in CBP.
Richard Dye (tdye) (09/26/17 11:04 am): Add prerequisite statement to course syllabus.
Richard Dye (tdye) (10/31/17 7:38 am): Rollback: The wording of the prerequisites in the syllabus does not match the wording on the CARS form. Please change the CARS form to match the syllabus: "Admission to Mays Commercial Banking Program". Thanks!
Sandra Williams (sandra-williams) (11/07/17 7:11 pm): Rollback: Syllabus is missing link to student rule 7.
Sandra Williams (sandra-williams) (12/14/17 11:46 am): Update received.

Reported to state? Add

Key: 18125
Nature of Course

This course is intended to be an upper division required course for students admitted to the Commercial Banking Program (“CBP”) in the Department of Finance. Class materials will consist of a financial products/services textbook specific to the banking industry. The course objectives are: (a) to equip students with marketing and sales processes for representing major banking products and services to clients and prospects of commercial banks; and (b) Provide students with marketing/sales strategies and processes of commercial banks that result in successful positioning of the bank in its trade territory. In addition, students will learn the consultative sales process, and effective presentation skills.

Classes will be taught by: (a) CBP Executive Director; (b) Banking executives with specific product/service expertise

In general, the course will cover the following topics:
- Approaching and Interviewing different personality types
- Selling Scope
- The Selling Officer
- Prospecting For Business
- Successful Selling Cycle
- Product Knowledge
- Pricing in the Selling Process
- Calling Program: A Must to Sell
- Advertising/Marketing to Sell
- Marketing Research to Successful Position the Bank
- Ethics in Selling Financial Products and Services
- How to Negotiate with different personality types
- How to Close Sales

Textbook
Selling Financial Products: A Practical Guide for Successful Bank Sales with Case Studies
By: James B. Bexley, Ph.D.
Chairholder and Professor of Finance, Smith-Hutson Endowed Chair of Banking
Sam Houston State University, Huntsville, TX
**Exams, Attendance, and Grading.**

Three major exams will be given on the dates shown on the "Schedule of Assignments." Each exam is worth 100 points. The total possible exam score for three tests will be 300 total points.

Students are expected to attend all class meetings and read any assigned material in advance of each class. This is a fast-paced course; missing a class will significantly impede one’s progress and success in the course. Refer to Texas A&M University Student Rules [[Student Rule 7. student-rules.tamu.edu]] for attendance policy and university-excused absences. Make-up exams can be arranged with the instructor in the event of a university-excused absence from class.

The final grade will be calculated on the basis of the average points earned out of 300 total points. Point totals correspond to the following grades: A - 270, B - 240, C - 210, D – 180, F - below 180.

**Academic Honesty**

You may not share, lend, or borrow another student’s work in any manner. You are expected to conduct yourself in a manner consistent with the Aggie Honor Code: “An Aggie does not lie, cheat, or tolerate those who do.” Further information is available from http://aggiehonor.tamu.edu.

**Disability**

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please contact Disability Services, currently located in the Disability Services building at the Student Services at White Creek complex on west campus or call 979-845-1637. For additional information, visit http://disability.tamu.edu.

**Other**

We have a wonderful building with great facilities. Please make every effort to maintain this quality. NO BEVERAGES, FOOD, TOBACCO PRODUCTS, OR ANIMALS (UNLESS APPROVED) are permitted within the classroom.

**Prerequisites:** Admission to Mays Commercial Banking Program.

**Class Hours and Location**

Tues; Thurs: 3:55pm - 5:10 pm  
WCBA 185

**Office Hours**

Mon. [4:00pm – 5:00pm]; Tues. [10:00am – 11:00am] Room 351M Wehner.  
Other office hours by appointment (call 845-4886 or contact me in class).  
Email Address: wgarey@mays.tamu.edu
<table>
<thead>
<tr>
<th>WEEK</th>
<th>DATE</th>
<th>ASSIGNMENT</th>
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<tbody>
<tr>
<td>1</td>
<td>T: Jan. 16</td>
<td>Orientation; Course Obj.; Marketing/Sales from a holistic approach</td>
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<tr>
<td></td>
<td>Th: Jan. 18</td>
<td>How to “Approach” different Personality Types</td>
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<td>2</td>
<td>T: Jan. 23</td>
<td>How to “Interview” different Personality Types</td>
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<td></td>
<td>Th: Jan. 25</td>
<td>Chapter 1: Times Have Changed</td>
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<td>3</td>
<td>T: Jan. 30</td>
<td>Chapter 2: Introduction to Selling</td>
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<td></td>
<td>Th: Feb. 1</td>
<td>Chapter 2: Continued</td>
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<td>4</td>
<td>T: Feb. 6</td>
<td>Chapter 3: Selling Scope</td>
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<td></td>
<td>Th: Feb. 9</td>
<td>Chapter 3: Continued</td>
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<td>5</td>
<td>T: Feb. 13</td>
<td>Chapter 4: The Selling Officer</td>
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<td>Th: Feb. 15</td>
<td>EXAM #1</td>
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<td>6</td>
<td>T: Feb. 20</td>
<td>Guest Lecturer [Commercial Lending specialist]</td>
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<td>Th: Feb. 22</td>
<td>Chapter 5: Prospecting for Business</td>
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<td>7</td>
<td>T: Feb. 27</td>
<td>Chapter 5: Prospecting for Business [Cont.]</td>
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<td></td>
<td>Th: Mar. 1</td>
<td>Chapter 6: Successful Selling Cycle</td>
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<td>8</td>
<td>T: Mar. 6</td>
<td>Chapter 7: Product Knowledge</td>
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<td></td>
<td>Th: Mar. 8</td>
<td>Chapter 7: Product Knowledge [Cont.]</td>
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<td>SPRING BREAK [MARCH 12TH - MARCH 16TH]</td>
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<td>9</td>
<td>T: Mar. 20</td>
<td>Chapter 8: Pricing in the Selling Process</td>
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<td>Th: Mar. 22</td>
<td>EXAM #2</td>
</tr>
<tr>
<td>10</td>
<td>T: Mar. 27</td>
<td>Guest Lecturer [International Banking specialist]</td>
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<td></td>
<td>Th: Mar. 29</td>
<td>Chapter 9: Calling Program: A Must to Sell</td>
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<td>11</td>
<td>T: Apr. 3</td>
<td>Chapter 10: Advertising/Marketing to Sell</td>
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<tr>
<td></td>
<td>Th: Apr. 5</td>
<td>Guest Lecturer [Treasury Management specialists]</td>
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<tr>
<td>12</td>
<td>T: Apr. 10</td>
<td>Chapter 11: Marketing Research to Successfully Position the Bank</td>
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<td></td>
<td>Th: Apr. 12</td>
<td>Chapter 12: Ethics in Selling Financial Products and Services</td>
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<tr>
<td>13</td>
<td>T: Apr. 17</td>
<td>Guest Lecturer [Real Estate Lending Specialist]</td>
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<td></td>
<td>Th: Apr. 19</td>
<td>How to “Negotiate” with different Personality Types</td>
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<td>14</td>
<td>T: Apr. 24</td>
<td>[Guest Lecturer [Investments specialist]]</td>
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<td></td>
<td>Th: Apr. 26</td>
<td>How to Close Sales</td>
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<tr>
<td>15</td>
<td>T: May 1</td>
<td>Redefined Day [Students Attend Their Friday Classes]</td>
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<tr>
<td>16</td>
<td>T: May 4</td>
<td>EXAM #3 [FINAL EXAM; Covers Material since EXAM #2]</td>
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