

PREPARING FINANCIAL MARKETING PLANS

“Strategies to Effectively Position Financial Services and Products in Competitive Markets”

Schedule

Date	Venue	Fees (Face-to-Face)
02 – 06 Nov 2026	Dubai, UAE	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

In the dynamic world of financial services, marketing strategies must align with client needs, regulatory constraints, and fast-changing digital trends. Whether launching a new investment product or repositioning a bank’s brand, a well-crafted financial marketing plan is critical to success.

This course empowers professionals to build, implement, and evaluate strategic marketing plans tailored to the financial sector. Participants will learn to analyze market trends, define customer segments, develop campaign strategies, and measure ROI—all while maintaining compliance with financial regulations.

Objectives

By the end of this course, participants will be able to:

- Develop integrated marketing plans for financial services and institutions
- Segment markets and identify key customer personas
- Design compliant, customer-centric marketing campaigns
- Utilize digital and traditional marketing tools to achieve business goals
- Measure the effectiveness of marketing initiatives using financial metrics

Why Attend

- Understand the unique challenges and opportunities in financial marketing
- Strengthen your ability to position financial products for target markets
- Learn how to comply with marketing regulations in the banking and investment sectors
- Master campaign planning from concept to measurement
- Enhance your organization's competitive advantage through marketing strategy

Target Audience

This program is designed for:

- Marketing managers in financial institutions
- Product managers and business development professionals
- Advertising and branding specialists in banking and insurance
- Financial services consultants and strategists
- Communication and compliance officers in regulated financial sectors

Individual Benefits

Key competencies that will be developed include:

- Strategic thinking in financial product marketing
- Brand positioning and value proposition development
- Customer segmentation and buyer journey mapping
- Digital campaign design and execution (SEO, email, social media)
- Marketing ROI analysis and reporting

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Stronger alignment between marketing and business goals
- Enhanced client acquisition and retention strategies
- Improved risk-aware marketing communication
- Streamlined marketing operations and budget efficiency
- Effective launch and promotion of new financial services

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings - Market analysis, marketing frameworks, and financial compliance
- Case Studies - Real-world campaigns from leading financial institutions
- Workshops - Plan development, messaging creation, and channel mix modeling
- Peer Exchange - Insights from peers on regional financial marketing practices
- Tools - Marketing plan templates, budgeting models, and KPI dashboards

Course Outline

Detailed 5-Day Course Outline

Training Hours: 7:30 AM – 3:30 PM **Daily Format:** 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Marketing Foundations in Financial Services

- Module 1: The Role of Marketing in Financial Institutions (07:30 – 09:30) • Unique challenges and regulatory implications
- Module 2: Customer Segmentation and Behavior (09:45 – 11:15) • Understanding personas, demographics, and psychographics
- Module 3: Workshop – Define Your Ideal Customer (11:30 – 01:00) • Create a customer profile for a financial product
- Module 4: Peer Exchange – Marketing Missteps in Finance (02:00 – 03:30) • Group discussion on campaign failures and lessons

Day 2: Strategic Planning and Market Analysis

- Module 5: Market Research and Competitor Analysis (07:30 – 09:30) • Trends, benchmarks, and positioning strategies
- Module 6: Brand Strategy and Value Proposition (09:45 – 11:15) • Differentiation and emotional branding in finance
- Module 7: Workshop – Crafting a Brand Position (11:30 – 01:00) • Develop messaging for a niche financial market
- Module 8: Case Study – Banking Brand Revamp (02:00 – 03:30) • Analyze a real-world rebranding initiative

Day 3: Campaign Development and Multi-Channel Execution

- Module 9: Integrated Marketing Communication (07:30 – 09:30) • Online, offline, and omnichannel campaign planning
- Module 10: Digital Tools in Financial Marketing (09:45 – 11:15) • SEO, paid ads, email, webinars, and mobile apps
- Module 11: Workshop – Campaign Calendar Design (11:30 – 01:00) • Map a quarterly marketing campaign schedule
- Module 12: Peer Exchange – Comparing Traditional and Digital Approaches (02:00 – 03:30) • Industry trends and budget allocation strategies

Day 4: Regulation, Compliance, and Risk-Aware Communication

- Module 13: Financial Advertising Compliance (07:30 – 09:30)
 - Regulatory guidelines, disclaimers, and customer rights
- Module 14: Communicating Complex Financial Products (09:45 – 11:15) • Simplifying jargon and meeting literacy standards
- Module 15: Workshop – Regulatory Checklist Review (11:30 – 01:00) • Verify a sample campaign's compliance
- Module 16: Case Study – Marketing Audit Failure (02:00 – 03:30) • Review the impact of non-compliance in financial promotions

Day 5: Budgeting, KPIs, and Final Plan Presentation

- Module 17: Marketing Budget Planning and ROI (07:30 – 09:30) • Forecasting, cost allocation, and returns tracking
- Module 18: KPIs and Marketing Analytics (09:45 – 11:15) • Lead conversion, brand awareness, CAC, CLV
- Module 19: Final Project – Financial Marketing Plan Presentation (11:30 – 01:00) • Present your group's full campaign strategy
- Module 20: Wrap-Up, Feedback, and Certification (02:00 – 03:30) • Course summary, final discussion, and certificate awarding

Certification

Participants will receive a Certificate of Completion in Preparing Financial Marketing Plans, validating their expertise in creating, executing, and evaluating marketing strategies specifically tailored for financial services and institutions.

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