Practical Issues on Financial Services Marketing
Department of Risk Management and Insurance,
College of Commerce, NCCU
September, 2013-January, 2014
9:10-12:00, Wednesday

Instructor: Professor Yaolung J. Hsieh
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Reference book:
2. Yin, Robert K., Case Study Research: Design and Methods, 4th edition, Thousand Oaks, Calif.: Sage Publications, 2009 (or find any research books that focus on “case study” from the library).

Objectives:
The purposes of this course are to provide you an opportunity to be familiar with
1. marketing strategies suitable for managers in the financial services industry,
2. research skills of collecting and analyzing information as well we writing reports, and
3. communicational styles of marketing managers in the financial services industry.

Course Tactics:
1. The instructor is responsible for giving lectures about research topics and research techniques; and responding students’ questions;
2. Students are responsible for selecting research topics that interest them, conducting literature review, collecting and analyzing data collected from the financial services industry as well as writing their reports.

Grading Policy:
Class participation 10 %
In-depth interviews (15 for each) 30 %
Term project presentation 10 %
Written term Project 50 %

Total 100 %
Term Project:

Students can choose one of the topics listed below. A proposal presentation regarding this project is scheduled in class November 13. This project can be completed individually or by a group of 2 members. This report should be limited to 20-30 pages, double-spaced, with 12-point fonts. The evaluation form can be found in Appendix I.

1. Group insurance marketing and Worksite marketing;
2. Bancassurance in Taiwan;
3. Customer relationship management in the banking industry;
4. Relationship marketing in the brokerage industry;
5. Internet marketing in the fund investment industry;
6. Seminar marketing in the financial services industry;
7. Others with approval.

A part of this project involves conducting two in-depth interviews1 (per student) with the subject that you intend to investigate. The in-depth interviews are due on November 27 and December 25, respectively. Grace points will be given to students who turn in extra interview transcripts. Further instructions as well as samples of interview transcript and term project will be given by September 25.

Attention:
1. When emailing me your assignments, use your group name as file name for term projects and your own name as file name for the rest of your homework.
2. You should hand in a hard copy and email me the file for all assignments.
3. Except for technical terms, the only language used during class discussion and in your assignments is Chinese.
4. The due time for turning in your assignments is 5 pm of the due date.

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1 I may merge your interview data into my personal data pool for research purpose. If you have any objections, please inform me by December 25.
# Practical Issues on Financial Services Marketing

Tentative Course Outline

<table>
<thead>
<tr>
<th>Dates</th>
<th>Topics</th>
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<tbody>
<tr>
<td>9/18</td>
<td>Introduction</td>
</tr>
<tr>
<td>9/25</td>
<td>Introduction of research methodology-A case study approach</td>
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<tr>
<td>10/2</td>
<td><strong>Discussion of templates</strong> (Selection of research topics and working groups)</td>
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<tr>
<td>10/9</td>
<td>Literature review and research methodology</td>
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<td>10/16</td>
<td>Literature review and research methodology</td>
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<td>10/23</td>
<td>Literature review and research methodology</td>
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<tr>
<td>10/30</td>
<td>Literature review and research methodology</td>
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<tr>
<td>11/6</td>
<td>Literature review and research methodology</td>
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<tr>
<td>11/13</td>
<td><strong>Proposal presentation</strong></td>
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<tr>
<td>11/20</td>
<td>Data gathering and analysis</td>
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<tr>
<td>11/27</td>
<td>Data gathering and analysis</td>
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<tr>
<td></td>
<td>😊 (1st in-depth interview due)</td>
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<tr>
<td>12/4</td>
<td>Data gathering and analysis</td>
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<tr>
<td>12/11</td>
<td>Data gathering and analysis</td>
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<td>12/18</td>
<td>Data gathering and analysis</td>
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<tr>
<td>12/25</td>
<td>Data gathering and analysis</td>
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<td>😊 (2nd in-depth interview due)</td>
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1/1/2014 No class

1/8 Time to summarize what you have collected

1/15 Term project presentation 😊 happy ending 😊

Appendix I: Evaluation for Term Project

1. Oral presentation
   a. Stage posture (20 %)
   b. Skill (20 %)
   c. Content (50 %)
   d. Dress (10 %)

2. Written report
   a. Skill (30 %)
   b. Content (70 %)

3. A group score will be assigned to each group.

4. Member score: If every member of the group agrees, each member of the group will receive the same score. In case of a dispute among the members, a self-and-peer-evaluation will be conducted to determine the relative contribution of each member to the project. Each member will then receive a score computed based on her (his) contribution.