

A: Division: **INSTRUCTIONAL**  
 B: Faculty: **COMMERCE AND BUSINESS  
ADMINISTRATION**  
 Program: **FINANCIAL SERVICES STUDIES**

Date: **MAY 1997**

New Course: **X**

Revision of Course  
Information form:

C: FINC 220 D: RELATIONSHIP BANKING E: 3 ✓  
 Subject & Course No. Descriptive Title Semester Credit

F: Calendar Description: This course is an introduction to the communication process as applied to relationship banking. The emphasis is on the development of techniques for dealing effectively with customers and co-workers. Many of the applications will be tailored to the financial services industry.	Summary of Revisions:
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G: Type of instruction: Hrs per week

Lecture:	2	Hrs.
Laboratory:		Hrs.
Seminar:	2	Hrs.
Clinical Experience:		Hrs.
Field Experience:		Hrs.
Practicum:		Hrs.
Shop:		Hrs.
Studio:		Hrs.
Student Directed Learning:		Hrs.
Other (Specify):		
Total:	4	Hrs.
Semester Total(4X15wks):	60	Hrs.

H: Course Prerequisites:  
**English 12 with minimum C grade or PLA**

I: Course Corequisites:  
**nil**

J: Course for which this Course is a Prerequisite:  
**nil**

K: Maximum Class Size:  
**35**

L: College Credit Transfer   
 College Credit Non-Transfer   
 Non-Credit

M: Transfer Credit: Requested:   
 Granted:

Specify Course Equivalents or Unassigned Credit as appropriate:

BCOU  
 SFU  
 UBC  
 UNBC  
 UVIC  
 Other:

*E. Carter*  
 Course Designer(s): E. Carter  
*J. Sator*  
 Dean: J. Sator

*J. McKendry*  
 Vice-President, Instruction: J. McKendry  
*P. Angus*  
 Registrar: P. Angus

**N: TEXTBOOKS AND MATERIALS TO BE PURCHASED BY STUDENTS**

UNDER REVIEW

**O: COURSE OBJECTIVES**

The student will reliably demonstrate the ability to analyze analytic concerns and skill-building techniques that will prepare them to establish the customer "relationships" that will enable them to act as an effective "link pin" between the customer with unsatisfied financial needs and wants and the financial institution which has developed the products and services to satisfy these needs and wants.

**P: COURSE CONTENT**

1. Concept of relationship banking
  - . Why it has become necessary
  - . The benefits it provides to both the customer and the financial institution
  
2. Communication process
  - . Formal communication model
  - . Verbal communication techniques
  - . The impact of non-verbal communication
  - . Proxemics and their influence on effective communication
  - . Active listening skills
  - . Perceptions, paradigms and filters, including techniques for recognizing them and changing them on a personal basis
  - . Art of questioning
  - . Persuasive techniques
  
3. The customer as an individual
  - . Customer profiling techniques
  - . Motivation and why it varies for individuals
  - . Customer learning styles
  
4. Management of stress and conflict
  - . Generic conflict resolution techniques
  - . Specific techniques for handling customer complaints
  - . Handling resistance
  - . Recognition of specific types of "difficult" customers and development of techniques to deal with same
  - . Causes of stress and techniques for its reduction

5. Presentation skills
  - . Organization of material
  - . Effective presentation techniques
  - . Audience assessment
6. Management of meetings
  - . How to effectively organize meetings
  - . How to be an effective participant at meetings
7. Ethics as they relate to the financial industry with an emphasis on privacy codes.

**Q: METHOD OF INSTRUCTION**

Material will be presented within a lecture/discussion environment.

**R: COURSE EVALUATION**

Midterm Examinations (2)	40%
Final Examination	30%
Written Assignments	20%
Class Participation	<u>10%</u>
	<u>100%</u>