
SOCIAL MEDIA MARKETING FOR FINANCIAL ADVISER REPRESENTATIVE (9AM – 6.30PM)

Course Title:

Social Media Marketing for Financial Adviser Representative

Course Fee:

\$850 before GST

Mode of training:

Synchronous E-learning with Assessment

Programme Structure:

In this highly regulated industry, it is essential for leaders, managers, and representatives in the financial services industry to be in line with MAS standard for advertisements so as not to breach PDPA amongst other regulations. This is also a fast-paced industry where product and market updates should be communicated to clients promptly and it can be done via email automation. In doing so, good customer service is practiced, efficiency can be maximized and cost is controlled.

This workshop is created to impart the requisite skills, tools and thought process in a structured, informative and holistic manner for those in the financial services industry. This program is designed as a 1-day virtual workshop packed with activities. Varied training methodologies in addition to theoretical learning will be adopted to provide a positive learning environment. The program applies evidence-based methods that work in the real world of financial services.

The program adopts a competency-based assessment approach using case studies and practical activities designed to engage and empower the learners.

Course Objectives:

Upon completion of the programme, the participants be able to

- Differentiate the different types and purpose of social media marketing platforms
- Identify the 6 steps of planning a social media marketing campaign
- Create a Facebook Business Page
- Develop a client persona
- Create a profile list for audience targeting
- Understand PDPA and MAS requirement for the financial advisory industry
- Create a compliant disclosure statement
- Produce a Facebook advertisement
- Evaluate a Facebook advertisement

By the end of the workshop, participants will be equipped with actionable insights and strategies to elevate their customer service excellence, ultimately leading to stronger customer relationships and increased satisfaction.

Target Audience:

- Financial Planners and Relationship Managers

Training Methodologies:

- Dynamic & Highly Engaging Virtual Presentations
- Useful Practical Demonstrations
- Experiential Learning Sessions
- Goal Setting Exercises
- Self-Evaluation Exercises

Minimum entry requirements:

- Must be financial services

Time	Lesson Plan	Duration (Hours)
0900 to 0915	Admin & Ice Breaking	15mins
0915 to 1100	<p>Lesson 1: What is social media marketing</p> <ul style="list-style-type: none"> • What is social media marketing • Importance of social media marketing • Group Discussion 1 • Different platforms for social media marketing <p>Lesson 2: Building Your Social Media Marketing Strategy</p> <ul style="list-style-type: none"> • The key principles of customer engagement • The 6 steps of social media marketing • Different types of Facebook account 	1hr 45mins
1100 to 1115	15 Mins Break	
1115 to 1300	<p>Lesson 2: Building Your Social Media Marketing Strategy</p> <ul style="list-style-type: none"> • Creating your Facebook Business Page <p>Lesson 3: Creating an audience</p> <ul style="list-style-type: none"> • Creating your client persona • Case study • Audience targeting • Reaching out to the audience <p>Lesson 4: Creating an audience</p> <ul style="list-style-type: none"> • An overview of PDPA 	1hr 45mins
1300 to 1400	1 Hour Lunch	
1400 to 1600	<p>Lesson 4: Creating an audience</p> <ul style="list-style-type: none"> • MAS Fair and Balance Advertising • Case Study • Creating a disclosure statement • Group work • Create a lead form • Going "LIVE" • Review of Campaign 	2hrs
1600 to 1615	15 Mins Break	
1615 to 1830	<p>Lesson 5: Converting leads to sales</p> <ul style="list-style-type: none"> • The sales process • Needs Analysis • Handling objections <p>Final Summary, Assessment Briefing + Assessment</p>	2hr 15mins
	Total Duration	8 Hours

IBF Standards Training Scheme (IBF-STS)

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met.

Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The IBF-STS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S3,000 per candidate per course subject to all eligibility criteria being met.

Find out more on www.ibf.org.sg.

About IBF Certification

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Digital Marketing (proficiency level 3)

Participants are encouraged to access the IBF MySkills Portfolio (<https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio>) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process on <https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified>

*Note: Digital Marketing is not a skill within the Financial Planner skills map.