

## CFMP Examination Outline

The knowledge areas below are the basis for the Certified Financial Marketing Professional (CFMP) examination. These knowledge areas were derived from a job analysis study of the financial marketing profession and were validated by the CFMP Advisory Board. Post-certification programs that address these knowledge areas are eligible for CFMP continuing education through the American Bankers Association.

### **I. Product Development & Delivery Channels (18%)**

- A. Product characteristics
- B. Pricing strategies
- C. Delivery channel alternatives (traditional & nontraditional)

### **II. Risk Management (9%)**

- A. Loan products
- B. Deposit products
- C. Non-traditional products
- D. Promotions, Give-A-Ways, Sweepstakes
- E. Privacy considerations
- F. Incident Response
- G. Delivery Channels (e.g., internet, debit card, remote capture, branch, social media, etc.)
- H. Ethics
- I. Vendor Management
- J. CRA

### **III. Customer Experience & Sales (26%)**

- A. Qualitative techniques
- B. Quantitative techniques
- C. Customer intelligence
- D. Competitive intelligence
- E. Market Analysis
- F. Sales & Service
  - a. Sales support

### **IV. Revenue Generation Planning (32%)**

- A. Balance sheets, income statements, & ratios
- B. Asset/liability management
- C. Budgets
- D. Profitability
- E. Situation analysis
- F. Objectives
- G. Market segmentation, target marketing, customer relationship management
- H. Strategies
- I. Tactics
- J. Cost/benefit analysis and ROI
- K. Pricing strategies (e.g., penetration, skimming, etc.)

### **V. Branding & Communications (15%)**

- A. Promotion
- B. Brand characteristics
- C. Public Relations & Communications